



THE GASPER LAW GROUP

A PROFESSIONAL LIMITED LIABILITY COMPANY
The Historic Alamo Building
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Attorney: _____

"HELPING PEOPLE FIRST"™

CRIMINAL DEFENSE
DOMESTIC RELATIONS
PROBATE
WILLS & TRUSTS
ESTATE PLANNING

PROBATE INTAKE FORM

Please complete this form with the requested information and bring with you to meet with us. The information provided will be required before settling the estate. If you are unsure of any information requested, please so indicate.

Client Information

Name: _____

Address: _____

Home Phone: _____ Work phone: _____ Cell phone: _____

Email address: _____

Birth Date: _____ SS#: _____

Employer: _____ Occupation: _____

Relationship to Decedent: _____

Decedent Information

Name: _____

Residence: _____

Date of Death: _____ Place of Death: _____ Age: _____

Cause of death: _____

Did decedent sign a Will? _____ If yes, please bring original. DO NOT REMOVE STAPLES!

Address of Real Property/Properties Owned by Decedent: _____

Financial Accounts Owned by Decedent and Values (List any joint tenants or beneficiaries):

Life insurance policies, values and beneficiaries:

Name of Funeral Home: _____

Funeral Cost: _____ Paid by whom? _____

Decedent Family Information (Name and Address for each. If deceased, list date of death.)

Mother: _____

Father: _____

Spouse: _____

Children (Indicate son/daughter – If a son or daughter is deceased, list his or her children):

Siblings (Indicate brother/sister – If a brother or sister is deceased, list his or her children):

Please check if any of the following apply:

Decedent owns rental or other income-producing property

Decedent has known creditors

Decedent received private care by family or other non-paid worker prior to death

Decedent has minor or disabled children

Client believes that controversy may arise among family members or other family has already hired attorney

Decedent had signed trust of any kind

Money may have been withdrawn without decedent's consent prior to death

Client or other person served as agent under power of attorney

Client or other person served as guardian

Estate proceedings have been filed in another state or county

You hereby acknowledge that you are present for an Initial Consultation only and that The Gasper Law Group will not take any action whatsoever on your behalf or represent you in any action unless and until you sign a separate Client Engagement & Fee Agreement. You expressly acknowledge that the attorney(s) you will meet today will not provide you any legal advice regarding your specific matter and that the Initial Consultation is an opportunity for you to interview and determine whether The Gasper Law Group will be able to assist you with your legal needs going forward.

Signed: _____ Date: _____