

# Probate & Estate Administration Intake Sheet

Ament Law Group, P.C. — Free Initial Consultation

Fill in what you know — we will guide you through the rest.

## About You (the person opening the estate)

Your First Name

Your Last Name

Phone (best)

Email

Your relationship to the decedent

Are you named as executor in the will? (yes / no / no will)

## About the Decedent

Decedent's Full Legal Name

Date of Death

Date of Birth

Age at Death

Last known address (county matters for filing)

PA resident at time of death? (yes / no)

## Will & Documents

There is a will

No will found

Not sure

Where is the original will? (original required — photocopies not accepted)

Will is self-proved (notarized)

Will needs witnesses to verify

Not sure

## Estate Assets

List what you know — estimates are fine. This helps us determine the right approach for the estate.

| Asset Type                  | Description / Location | Estimated Value | Solely Owned? |
|-----------------------------|------------------------|-----------------|---------------|
| Real estate (PA)            |                        |                 |               |
| Real estate (other state)   |                        |                 |               |
| Bank / savings accounts     |                        |                 |               |
| Investment / brokerage      |                        |                 |               |
| IRA / 401(k) / retirement   |                        |                 |               |
| Life insurance (face value) |                        |                 |               |
| Vehicle(s)                  |                        |                 |               |
| Business interest           |                        |                 |               |

|       |  |  |  |
|-------|--|--|--|
| Other |  |  |  |
|-------|--|--|--|

Note: Joint accounts, TOD/POD accounts, and life insurance with named beneficiaries may pass outside probate. We will sort this out with you.

### Known Debts & Obligations

| Debt Type                | Creditor / Lender | Estimated Balance |
|--------------------------|-------------------|-------------------|
| Mortgage                 |                   |                   |
| Car loan                 |                   |                   |
| Credit cards             |                   |                   |
| Medical bills            |                   |                   |
| Personal loans           |                   |                   |
| Tax owed (federal/state) |                   |                   |
| Other                    |                   |                   |

No known debts

### Beneficiaries & Family

Surviving spouse? (name)

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Children (names — note any minors or disabled beneficiaries)

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Any beneficiaries outside PA or outside the US?

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### Anything else we should know about the estate:

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