



The Law Offices of  
**Carol Bertsch, PC**

*Assisting Seniors, Helping Families*

**PROBATE QUESTIONNAIRE**

Would you like to sign up for our newsletter?

\_\_\_\_yes\_\_\_\_no

How did you hear about us?\_\_\_\_\_

Name of Applicant\_\_\_\_\_

Address:\_\_\_\_\_

City, State, Zip\_\_\_\_\_

Phone No.:\_\_\_\_\_email:\_\_\_\_\_

Date of Birth;\_\_\_\_\_

Social Security No.:\_\_\_\_\_

Texas Driver's License:\_\_\_\_\_

Have you ever been convicted of a felony?\_\_\_\_\_

## What is Probate?

*1. Certificate issued by a court that the will of a deceased is legally valid, and that the executors appointed under the will are authorized to administer his or her estate.*

*2. Legal process by which the assets of a deceased are properly distributed to the beneficiaries or heirs through an executor named in the will, or according to the local law by a court appointed administrator, if there was no will. The court's objective is to ensure that the deceased's debts, taxes, and other valid-claims are paid out of his or her estate before any distribution is made to the estate's beneficiaries, in accordance with the will or on the orders of the court, if there is no will.*

**Name of Deceased:** \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Date of Death: \_\_\_\_\_

Place of Death: \_\_\_\_\_

Social Security No.: \_\_\_\_\_

Texas Driver's License: \_\_\_\_\_

**Was Decedent married at the time of death?**

Name of Spouse: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, County: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Date of Marriage: \_\_\_\_\_

**Was the Decedent on Medicaid at the time of death?** \_\_\_\_\_



**PLEASE REMEMBER TO BRING A COPY OF  
THE DEATH CERTIFICATE AND THE  
ORIGINAL WILL**

*Did you know:*

*If you don't have a will, then the state decides how your assets get divided?*

*If you do have a will, you must take it to court and have it approved, before it is effective?*

**Who are the beneficiaries?** (If you are the only one, skip to the next section)

Beneficiary's Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Phone number: \_\_\_\_\_ Email address: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Relationship to the Deceased: \_\_\_\_\_ Are they married? \_\_\_\_\_

Beneficiary's Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Phone number: \_\_\_\_\_ Email address: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Relationship to the Deceased: \_\_\_\_\_ Are they married? \_\_\_\_\_

Beneficiary's Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Phone number: \_\_\_\_\_ Email address: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Relationship to the Deceased: \_\_\_\_\_ Are they married? \_\_\_\_\_

Beneficiary's Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Phone number: \_\_\_\_\_ Email address: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Relationship to the Deceased: \_\_\_\_\_ Are they married? \_\_\_\_\_

Beneficiary's Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Phone number: \_\_\_\_\_ Email address: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Relationship to the Deceased: \_\_\_\_\_ Are they married? \_\_\_\_\_

**Are any of the beneficiaries deceased?**

Deceased Beneficiary: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Date of Death: \_\_\_\_\_

Were they married? \_\_\_\_\_ Name of Spouse \_\_\_\_\_

Deceased Beneficiary: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Date of Death: \_\_\_\_\_

Were they married? \_\_\_\_\_ Name of Spouse \_\_\_\_\_

**Assets:**  
 (We only need to know the ones that do not have named beneficiaries)

<b>Real Estate/County</b>	<b>Address</b>	<b>Value</b>
<b>Mineral Rights/County</b>	<b>Legal</b>	<b>Value</b>
<b><u>Vehicles</u></b> 1. Year/Make/Model 2. Mileage 3. Color 4. Condition: Fair, Good, Very Good or Excellent	<b>VIN # (17 Digits)</b>	<b>Value</b>
<b>Vehicle # 1</b>		
<b>Vehicle # 2</b>		

<b>Vehicle # 3</b>		
<b>Cash/Bank</b>	<b>Acct. No</b>	<b>Amount</b>
<b>Investments</b>	<b>Acct. No.</b>	<b>Value</b>
<b>Stocks Bonds, etc</b>	<b>Acct. No.</b>	<b>Value</b>
<b>Household Furnishings and Personal Items</b>	<b>You do not need to list each piece- just a total estimate</b>	<b>Value (Garage Sale Prices)</b>

**Total Value of Estate: \$ \_\_\_\_\_**