

Denise N. Yurkofsky
Attorney at Law

13 Pelham Island Road
Wayland, Massachusetts 01778

Telephone (508) 358-4878
Facsimile (508) 817-5435

ESTATE ADMINISTRATION QUESTIONNAIRE

Name of Decedent: _____

Date of Birth: _____

Date of Death: _____

Place of Death: _____

Principle residence of Decedent: _____

Marital Status of Decedent at Death: _____

Name of Decedent's Spouse: _____

Children of Decedent, their ages at present, addresses and telephone numbers. (If a child of the Decedent is deceased, please provide the names of his or her children. Feel free to attach a family tree for the Decedent.)

Copy of Will and any Codicils available? _____

Death Certificate available? _____

Location of any safe deposit box: _____

See Chart

List of all personal property (e.g. bank accounts, C.D.s, mutual funds, stocks, bonds, etc.), location of each asset, estimated values, and how the assets are titled (individually, jointly, etc.)

ESTATE ADMINISTRATION SUMMARY OF ASSETS

<u>1. Real Estate Address</u>	<u>Date Acquired</u>	<u>Owner</u>	<u>Use</u>	<u>Assessed Value</u>	<u>Mortgage</u>
<u>2. Bank Accounts/CD's (with account #s)</u>	<u>Owner</u>	<u>Value</u>	<u>Type</u>		
<u>3. Investment Accounts- Company (mutual funds, stocks, etc.)</u>	<u>Owner</u>	<u>Value</u>	<u>Type</u>		
<u>4. Retirement Accounts- Company</u>	<u>Owner</u>	<u>Value</u>			
<u>5. Annuities- Company</u>	<u>Owner</u>	<u>Value</u>			

<u>6. Life Insurance-Company</u>	<u>Owner</u>	<u>Value</u>			

Trusts- Was the Decedent a beneficiary or Trustee of any trusts? If so, give name and date of trust. (Please provide a copy of the trust if available.) _____

Please attach copies of income tax returns for the last two to three years.