

JOHN HOSE LAW
Successions- Estates- Inheritance

Call today for a consultation
504-831-4947

INFORMATION WORKSHEET

Decedent's Information:

Name _____

Address _____

Date of Birth _____

Date of Death _____

Social Security No. _____

Place of Death _____

Marital Status (Check One) Single _____ Divorced _____

Widowed _____ Married _____ (How Many Times _____)

Did the deceased have a will? _____ If Yes, attach a copy.

Where Is Will Located? _____

Spouse's Information: If married more than once, complete for each marriage

Name _____

Address _____

Date of Birth _____

Date of Marriage _____

Date of Divorce (If Applicable) _____

Date of Death (If Applicable) _____

Social Security Number _____

Children's Information: Complete information for each child even if
adopted or deceased

Child One:

Name _____

Spouse's Name _____

Address _____

Date of Birth _____

Social Security Number _____

Date of Death (If Applicable) _____

If child is deceased, provide above information for each grandchild

Child Two:

Name_____

Spouse's Name_____

Address_____

Date of Birth_____

Social Security Number_____

Date of Death (If Applicable)_____

If child is deceased, provide above information for each grandchild

Child Three:

Name_____

Spouse's Name_____

Address_____

Date of Birth_____

Social Security Number_____

Date of Death (If Applicable)_____

If child is deceased, provide above information for each grandchild

Assets:

Real estate owned at date of death:

Attach a copy of each act of sale or document whereby the property was acquired

Stocks and bonds owned at date of death:

Attach stock exchange or broker statement from date of death

Checking accounts:

Attach a copy of statement as of date of death

Savings accounts: including certificates of deposit or similar accounts:

Include certificates of deposit and statement as of date of death

Automobiles owned at time of death:

Other Assets Owned at Death:

List any other assets owned at death which should be listed such as antiques, jewelry, and coins.

Is there any property owned outside the state of Louisiana?

Debts & liabilities:

Mortgages on real estate:

Attach a statement for each mortgage

Debt on automobiles:

State automobile to which attached and amount

Other notes payable:

State to whom payable and attach statement

Accounts payable:

Include charge accounts and credit cards and attach a statement

Doctor, medical and hospital bills:

Funeral and burial bills:

Other debts:

Non-succession information

Retirement accounts:

IRA's: _____

401k's: _____

Other: _____

Insurance policies: _____

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