

SMALL ESTATES INFORMATION SHEET

Date _____

1. Name of decedent: _____
Age: _____ Marital status: _____
Social Security No.: _____ Spouse Soc. Sec. No.: _____
Residence: _____
Date of death: _____ Place of death: _____
Cause of death (State whether death was accidental or ensued as a result of injury sustained in course of employment): _____
Citizen of: _____
Occupation: _____ Last employed by: _____
Date last employed: _____ Last tax returns filed: _____
U.S. Estate tax return filed: _____

2. Did decedent leave a will: () Yes () No
Executor: _____
Witnesses (Names and current addresses): _____
Beneficiaries (Names, age, relationship, residence & birthdate of minor): _____

3. Is there a domiciliary probate: _____

4. Solely owned assets:
Personal property: _____

Real Property: _____

INFORMATION SHEET

Informant: _____
Relationship to decedent: _____
Address: _____

Phone: Residence _____
Business _____

(over)

5. Heirs (Name, age relationship and address):

6. Funeral expenses: \$ _____. Paid by: _____

If any portion to be paid by Social Security, VA, funeral plan, etc., state by whom and the amount _____

7. Remarks: _____

DOCUMENTS REQUIRED FOR SMALL ESTATE PROCEEDINGS

IF DECEDENT DIED TESTATE (WITH WILL):

- A. And an executor has been appointed in probate proceedings in the decedent's place of domicile:
 - 1. EXEMPLIFIED or CERTIFIED copies of the following:
 - a. Order for Probate
 - b. Letters Testamentary
 - c. Last Will and Testament
 - d. Decree of Distribution, if already filed
 - 2. CERTIFIED copy of Certificate of Death
- B. No executor appointed in the place of domicile:
 - 1. CERTIFIED copy of Certificate of Death
 - 2. ORIGINAL Will
 - 3. Name and address of one of the subscribing witnesses whose deposition can be taken as to the Will (This information is needed only if the Will is not notarized.)

IF DECEDENT DIED INTESTATE (WITHOUT WILL):

- A. And an administrator has been appointed in probate proceedings in the decedent's place of domicile:
 - 1. EXEMPLIFIED or CERTIFIED copies of the following:
 - a. Order Appointing Administrator
 - b. Letters of Administration
 - c. Decree of Distribution, if already filed
 - 2. CERTIFIED copy of Certificate of Death
- B. No administrator appointed in the place of domicile:
 - 1. CERTIFIED copy of Certificate of Death

REQUIRED FOR ALL ESTATES, IN ADDITION TO THE ABOVE:

- A. OWNER'S COPY of TRANSFER CERTIFICATE OF TITLE (Not xeroxed copy) for Land Court Property, or DEED for all other property.
- B. If decedent had only an EQUITY INTEREST in real property:
 - 1. Agreement of Sale
 - 2. Balance of Contract, as of date of death
- C. TAX MAP KEY NUMBER for the real property
- D. INFORMATION SHEET) Both to be completed
CERTIFICATE AS TO DECEDENT'S RELATIVES) by proper person
- E. Copy of FEDERAL ESTATE TAX RETURN, if one was filed. If one was not required to be filed, please so state in writing.