

NOTE: Please PRINT legibly and make sure ALL information is correct. Thank you.
Probate Estate Questionnaire

Who referred you to The Law Office of Brown & Brown, P.C.? If not referred by someone in particular, how did you find out about our firm?

Decedent:

Full name _____

Last Known Address _____

Date of birth _____ Date of death: _____

Social Security number ____ - ____ - _____

Previous Spouse (if applicable):

Full name _____

Last Known Address _____

Date of birth _____ Date of death (if applicable): _____

Social Security number ____ - ____ - _____

Executor of the estate:

Full name _____

Address _____

Date of birth _____ Phone Number (____) _____

Social Security number ____ - ____ - _____

Children:

1. Full name _____ Social Security number ____ - ____ - _____
Address _____ Date of Birth _____
_____ Date of Death (if applicable) _____
Phone Number (____) _____

2. Full name _____ Social Security number ____ - ____ - _____
Address _____ Date of Birth _____
_____ Date of Death (if applicable) _____
Phone Number (____) _____

3. Full name _____ Social Security number ____ - ____ - _____
Address _____ Date of Birth _____
_____ Date of Death (if applicable) _____
Phone Number (____) _____

4. Full name _____ Social Security number ____ - ____ - _____
Address _____ Date of Birth _____
_____ Date of Death (if applicable) _____
Phone Number (____) _____

5. Full name _____ Social Security number ____ - ____ - ____
Address _____ Date of Birth _____
_____ Date of Death (if applicable) _____
Phone Number (____) _____

Other: (step-children, siblings and other heirs, if any)

1. Full name _____ Social Security number ____ - ____ - ____
Address _____ Date of Birth _____
_____ Date of Death (if applicable) _____
Phone Number (____) _____ Relationship _____

2. Full name _____ Social Security number ____ - ____ - ____
Address _____ Date of Birth _____
_____ Date of Death (if applicable) _____
Phone Number (____) _____ Relationship _____

3. Full name _____ Social Security number ____ - ____ - ____
Address _____ Date of Birth _____
_____ Date of Death (if applicable) _____
Phone Number (____) _____ Relationship _____

4. Full name _____ Social Security number ____ - ____ - ____
Address _____ Date of Birth _____
_____ Date of Death (if applicable) _____
Phone Number (____) _____ Relationship _____

5. Full name _____ Social Security number ____ - ____ - ____
Address _____ Date of Birth _____
_____ Date of Death (if applicable) _____
Phone Number (____) _____ Relationship _____

6. Full name _____ Social Security number ____ - ____ - ____
Address _____ Date of Birth _____
_____ Date of Death (if applicable) _____
Phone Number (____) _____ Relationship _____

ITEMS TO BRING TO YOUR APPOINTMENT:

1. Existing estate planning documents, including original will and trust agreement, if any.
2. All financial information for the decedent, including copies of deeds to real property and titles to vehicles owned by the decedent.
3. Certified copy of death certificate.

ASSETS

Cash or Cash Equivalent Accounts

Real Property

Tangible Personal Property

Insurance

Life Insurance _____ **Death Benefit** _____ **Cash Value** _____

Vehicles

Other

B. Income

Income Type

Earned Income	_____
Social Security Retirement	_____
Other	_____

C. Transfers (gifts) of Assets Within Previous 60 Months

<u>Asset Transferred</u>	<u>Date</u>	<u>To Whom</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

D. Creditors of the Decedent's Estate

<u>Creditor</u>	<u>Amount Due</u>
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____



The Law Office of
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Privacy Notice

Attorneys, like other professionals who advise on personal financial matters, are now required by a new federal law, the Gramm-Leach-Bailey Act, to inform our clients of our policies regarding privacy of client information. By providing estate and tax planning services, financial and economic advisory services, and by preparing tax returns, we receive significant personal financial information from our clients. Attorneys have been and continue to be bound by professional standards of confidentiality that are even more stringent than those required by this new law. Therefore, we have, and will in the future, always protect your right to privacy.

Information We Collect

Brown & Brown, P.C. collects nonpublic personal information about you from these sources:

- Information we receive from you, including information on forms that we ask you to complete; and
- Information provided to us by your other advisors, such as accountants, life insurance agents, and investment advisors.

Restricted Disclosure

Brown & Brown, P.C. reveals nonpublic personal information about you only if:

- You request or authorize the disclosure.
- The disclosure is made to help complete a transaction that you initiated.
- The disclosure is permitted or required by law.

Our Internal Policies and Security Procedures to Maintain Your Privacy

We restrict access to nonpublic personal information about you to those employees who need to know the information in order for us to provide legal services to you. We educate our employees about the importance of maintaining client confidentiality and require them to follow our firm policies and the Colorado Rules of Professional Conduct. We maintain physical and procedural safeguards to protect the privacy of information about you.

If you have any questions regarding our policy regarding the professional standards of confidentiality and/or the privacy of information you provide to us, please do not hesitate to contact us.

❖Fellow, American College of Trust & Estate Counsel
*Certified as an Elder Law Attorney by the National Elder Law Foundation