



The following information will be used if we need to contact you (unless you indicate otherwise) and to evaluate your legal needs. This information will be held in strict confidence. This information will also help us initiate your case if you decide to retain our services. **Please print or type.**

Today's Date: \_\_\_\_\_ How were you referred to us? \_\_\_\_\_

### Client Information

Name: \_\_\_\_\_  
first middle last

Address: \_\_\_\_\_  
street city/state zip

County of Residence: \_\_\_\_\_ DOB: \_\_\_\_\_ SS #: - \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_  
mm/dd/yyyy

Contact Information: \_\_\_\_\_ home cell work Email: \_\_\_\_\_

### Decedent's Information

Legal Name of Decedent: \_\_\_\_\_  
first middle last

Address at Death: \_\_\_\_\_  
street city/state zip

DOB: \_\_\_\_\_ Date of Death: \_\_\_\_\_ SS #: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_  
mm/dd/yyyy mm/dd/yyyy

Address of real property (real estate) titled to the decedent at time of death:

\_\_\_\_\_ street city state zip

\_\_\_\_\_ street city state zip

\_\_\_\_\_ street city state zip



# Probate Client Intake Form

Legal Name of Spouse of Decedent: \_\_\_\_\_  
first middle last

Is Spouse Living? Yes No If no, date of death: \_\_\_\_\_  
mm/dd/yyyy

### Names, addresses and birth dates of decedent's living children:

Name	Address	Date of Birth (mm/dd/yyyy)
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

### Names and dates of death of decedent's deceased children

Name	Address	Date of death (mm/dd/yyyy)
_____	_____	_____
_____	_____	_____
_____	_____	_____

### Please provide:

1. Any deeds of real property (real estate) titled to decedent at date of death.
2. Certified death certificate.
3. Your photo ID (i.e. drivers license or passport)

### How were you referred to us?

Referral from \_\_\_\_\_

Legal Insurance (if applicable): ARAG CLC Hyatt Legal Other \_\_\_\_\_

Plan Member Name: \_\_\_\_\_ Plan Member ID or SS#: \_\_\_\_\_

Tradebank (if applicable): Name on card \_\_\_\_\_ Membership # \_\_\_\_\_