

LAW OFFICE OF JAMES E. MISCAVAGE

55 OLD CLAIRTON ROAD, SUITE 104, PITTSBURGH, PA 15236

Phone - (412) 653-5711

Fax - (412) 653-1228

Email - jamesmiscavage@gmail.com

Attorney

James E. Miscavage

PROBATE QUESTIONNAIRE

Your Name _____ Your Spouse's Name _____

Mailing Address _____

Email Address _____

Executor's Social Security Number _____

Phone (Home) _____ (Work) _____ (Cell) _____

DECEDENT

Name of Decedent _____ Relationship to Decedent _____

Decedent's Last Address _____

Date of Birth _____ Date of Death _____ Social Security No. _____

Place of Death _____

1. Is there a Will? _____ Do you have the original? _____

2. Decedent's heirs and next of kin:

Name	Address	Phone No.	Relationship	Social Security No.
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_____	_____	_____	_____	_____
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_____	_____	_____	_____	_____
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_____	_____	_____	_____	_____
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_____	_____	_____	_____	_____
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3. Did Decedent have a Safe Deposit Box? _____ If so, where? _____

4. Did Decedent own real estate in Pennsylvania? If yes, please list address, how titled and approximate fair market value.

5. Did Decedent own real estate in any other state other than Pennsylvania? If yes, please list address, how titled and approximate market value.

6. Did Decedent own any vehicles, mobile homes, boats, trailers, campsites or timeshares? If yes, please describe.

7. Did Decedent own any stocks, bonds, brokerage accounts or IRA accounts? If yes, please list:_____

8. Did Decedent own or have an interest in an LLC Corporation or Sole Proprietorship? If yes, please explain.

9. Please list any and all bank, federal credit union, trust, or savings accounts of the Decedent.

10. Did Decedent have any annuities or life insurance? If yes, please describe.

11. Please list all debts of the Decedent.

CREDITOR/DESCRIPTION

BALANCE OWED

Debts (continued)

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12. Did the Decedent own any U.S. Savings Bonds and/or have Certificates of Deposit? If so, describe below.
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13. If the Decedent was over the age of 55, please indicate whether the Decedent was on or received welfare, medicaid, cash assistance or medical benefits from a state or the federal government.
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14. Was the Decedent involved in any litigation or have reason to file suit against someone. If yes, please explain.
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15. Was the decedent a Veteran? ____ Yes ____ No.
Did you determine if any entitlement to benefits is due? ____ Yes ____ No.

DOCUMENTS TO PROVIDE (if available)

Will(s)
Death Certificate
Deed(s) to real estate
Mortgages(s) on real estate
Credit Card(s)/Loan statements
Bank and Brokerage account statement(s)
Insurance Policies
Titles to all vehicles
Last 2 years tax returns
1099's and W-2's for the year of death
Annuity Policies
Veteran Discharge papers

HOW DID YOU FIND THE ATTORNEY?

Referred by _____

_____ South Park News

_____ Phone Book

_____ Google

_____ In Community Magazine

_____ Live in Neighborhood/Saw Sign

_____ Internet search

_____ James Miscavage website

_____ Prior client

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