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CHARLES W. INGMAN (1953-1996)

INITIAL QUESTIONS FOR PROBATE

Testacy & Personal Representative

1. Did the Decedent leave a Will? _____
2. If so, where is the original? If not available, is a copy available? _____
3. Who is nominated in the Will as Personal Representative? _____

4. Is that person willing and able to serve? _____
5. If there was no Will, determine the same facts as in the determination of heirs:
 - Was the Decedent survived by a spouse? _____
 - If not, did the Decedent have any children who survived the Decedent? _____

Heirs

6. Is there a surviving spouse? _____
7. Did the Decedent ever have or adopt any children? _____
8. If so, what are the names, ages and addresses of the children and issue of a deceased child who survived the Decedent by 120 hours? _____

9. If there are no living issue or spouse of the Decedent, list the names of any of the following, ending when you first list people in the class where there are survivors: parents, grandparents, brothers and sisters, nieces and nephews.

Jurisdiction

10. In what state did the Decedent live at time of death?

11. In what state(s) did the Decedent own property which was not disposed of by a Will substitute (such as joint tenancy or a living trust)? _____

Assets

12. Is the total value of the estate, including life insurance and retirement plans likely to exceed \$500,000? _____

13. Did the Decedent own any real estate in Minnesota or elsewhere? _____

14. Was the Decedent employed at the time of death? _____ If so, what was his/her occupation? _____

15. What property is registered in the name of the Decedent? (If the Decedent was survived by a spouse, was the title in both names?)

• Bank accounts _____

• Automobiles _____

• Securities _____

• Life insurance _____

• Retirement Plans (including IRAs and annuities) _____

• Business or Farms _____

• Other Valuable Items _____

Checklist of Documents for the Client to Bring to the Meeting

- Original of Will and all Codicils
- List of names and addresses of heirs and Will beneficiaries
- Death certificate (if available)
- Title papers for real estate (Registered or Abstract?)
- All available information about assets and their value
- Last income tax return of Decedent
- List of questions that you may have