

# PROBATE WORKSHEET

Please use the back or another sheet if enough space is not provided.

**Name of Deceased:** \_\_\_\_\_

Last Home Address of Deceased: \_\_\_\_\_

\_\_\_\_\_

Place of Death: \_\_\_\_\_

Date of Death: \_\_\_\_\_ Birth Date: \_\_\_\_\_ Social Security #: \_\_\_\_\_

How long resided at last address: \_\_\_\_\_

**Surviving Spouse:** \_\_\_\_\_

Home Address: \_\_\_\_\_

\_\_\_\_\_

Telephone Number(s): Home: \_\_\_\_\_ Cell: \_\_\_\_\_

Social Security #: \_\_\_\_\_ Birth Date: \_\_\_\_\_ Date of Marriage: \_\_\_\_\_

**Previous Marriage(s):**

Name: \_\_\_\_\_ Date of Marriage: \_\_\_\_\_

Name: \_\_\_\_\_ Date of Marriage: \_\_\_\_\_

Name: \_\_\_\_\_ Date of Marriage: \_\_\_\_\_

**How did previous marriage(s) end? (State date, year and place):**

How Ended: \_\_\_\_\_ Date Ended: \_\_\_\_\_ Place: \_\_\_\_\_

How Ended: \_\_\_\_\_ Date Ended: \_\_\_\_\_ Place: \_\_\_\_\_

How Ended: \_\_\_\_\_ Date Ended: \_\_\_\_\_ Place: \_\_\_\_\_

Children of Deceased and any other beneficiaries - **For each list: name, address (including zip code and Parish/County they live in, relationship, date of birth, social security number and phone number).** List any children who have died before the deceased, giving their date of death. If a child was adopted or disabled please note:

**Name of Child/Beneficiary:** \_\_\_\_\_  
(Include maiden name)

Address: \_\_\_\_\_

Parish/County: \_\_\_\_\_ Relationship: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Social Security No: \_\_\_\_\_ Phone No: \_\_\_\_\_

Adopted:  Yes  No If yes, date: \_\_\_\_\_ Disabled:  Yes

**Name of Child/Beneficiary:** \_\_\_\_\_  
(Include maiden name)

Address: \_\_\_\_\_

Parish/County: \_\_\_\_\_ Relationship: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Social Security No: \_\_\_\_\_ Phone No: \_\_\_\_\_

Adopted:  Yes  No If yes, date: \_\_\_\_\_ Disabled:  Yes

**Name of Child/Beneficiary:** \_\_\_\_\_  
(Include maiden name)

Address: \_\_\_\_\_

Parish/County: \_\_\_\_\_ Relationship: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Social Security No: \_\_\_\_\_ Phone No: \_\_\_\_\_

Adopted:  Yes  No If yes, date: \_\_\_\_\_ Disabled:  Yes  No

**Name of Child/Beneficiary:** \_\_\_\_\_  
(Include maiden name)

Address: \_\_\_\_\_

Parish/County: \_\_\_\_\_ Relationship: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Social Security No: \_\_\_\_\_ Phone No: \_\_\_\_\_

Adopted:  Yes  No If yes, date: \_\_\_\_\_

Disabled:  Yes  No If yes, type of disability: \_\_\_\_\_

Is there a Will?  Yes  No Where is it? \_\_\_\_\_

**Please provide me with the ORIGINAL WILL.**

Did the deceased have a safety deposit box?  Yes  No

If so, where is it located (name of bank): \_\_\_\_\_

**ASSETS**

**Real Estate (Home or other):**

**(We will need a complete property description including book and page number [which can be obtained from the mortgage or deed] and the value of each piece of property)**

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**Bank Accounts: (We will need: name of bank; type of account; account number; name account is in balance in account as of date of death of decedent)**

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**Decedent's interest in any business(s):** \_\_\_\_\_

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**Are there any sub-chapter S corporations?** \_\_\_\_\_

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**Savings & loan or credit union accounts: (We will need: name of bank; type of account; account number; name account is in; balance in account as of date of death of decedent)**

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**Annuities: (list only if there is no beneficiary or if beneficiary is the estate)**

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**Thrift funds:**

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**U.S. Bonds: (Please bring copies of all bonds, we need serial number, date of issue and value)**

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**Other bonds:**

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**Stocks:**

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**Unpaid salary:**

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**Accounts receivable:**

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**Rents receivable:**

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**Notes receivable:**

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**Cash on hand:**

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**Oil/Gas Wells: (we will need copies of the death certificate for each company and please list location, parish/county, state, name of company, owner number)**

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**Automobiles, Trailers, Boats: (We will need: year, make, model, VIN and the value of the vehicle). If**

you have the vehicle Title or Certificate of Registration we will need a copy of it. If you cannot provide us with a value for each vehicle, we will need to know the mileage, condition, and what features the vehicle is equipped with.

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**Tools, firearms (give values):** \_\_\_\_\_

**Antiques (give values):** \_\_\_\_\_

**Jewelry (give values):** \_\_\_\_\_

**Furniture (give values):** \_\_\_\_\_

**Coins, art, collections (give values):** \_\_\_\_\_

**Claims or intangibles (give values):** \_\_\_\_\_

**Escrows or deposits:** \_\_\_\_\_

**Deferred compensation agreements:** \_\_\_\_\_

**Miscellaneous:** \_\_\_\_\_

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**DEBTS**

**Mortgages on home, autos or other property:** (We will need: name of lien holder and balance on mortgage; also specify if there is credit life insurance)

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**Signature loans at banks or other institutions:** (We will need: name of institution and balance on loan; also specify if there is credit life insurance)

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**Current debts:** (utilities, credit card debts, etc.) (Please give amount of debt as of date of decedent's death)

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**Medical & other expenses of last illness:** \_\_\_\_\_

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**Funeral expenses:** (specify if burial insurance, social security or veteran's benefits)

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**Any other debts incurred prior to death:** \_\_\_\_\_

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**Contingent liabilities:** \_\_\_\_\_

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**Was decedent a trustee of any trust or other fiduciary:** (tutor, executor, and administrator?)

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**Trusts created by decedent:** \_\_\_\_\_

**Donations within 1 year prior to death:** \_\_\_\_\_

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**Information and Instruction**  
**Sheet on Completing Probate Worksheet**

1. **Residence.** If you reside outside of the Shreveport/Bossier area and will be unable to come to the Shreveport/Bossier area for an appointment once you complete the Probate Worksheet, you may mail your Probate Worksheet, once it is completed, to my office. Once I receive the worksheet, I will prepare a draft of the succession and forward to you the draft along with an estimate of the attorney's fees and costs. All of the necessary signatures can be done by mail. The signatures need only be notarized in front of a Notary Public for the State and Parish or County where the person signing is located. If you live outside of the Shreveport/Bossier area and are having any problems, or have any questions with regard to the succession or how to complete the Probate Worksheet, feel free to give me a call. For those who reside in the local area, it is not necessary to give me a call prior to completing the Probate Worksheet unless you have questions or problems have arisen at that time. Once the Probate Worksheet is completed or completed to the best of your ability, just call and make an appointment to bring in the Probate Worksheet along with the **original will**.

2. **Legal Description of Property.** In completing the Probate Worksheet, it is important to have a complete legal description of any immovable property, land, homes, etc. That legal description is found on any deed, mortgage, and sometimes on insurance papers. The following is an example of a legal description:

Lot 29, Northland Estates Subdivision, Unit No. 2, a subdivision of Bossier City, Bossier Parish, Louisiana, as per plat recorded in Book 339, Pages 582-583 of the Conveyance Records of Bossier Parish, LA, together with all buildings and improvements thereon.

If you do not have a legal description, there will be an additional cost to obtain this for you.

3. **Estimating property values.** You should estimate the value to the best of your ability. It is not necessary to have a formal appraisal. A comparable price, or how other properties are selling in your neighborhood is sufficient.

4. **Furniture and furnishings.** We usually use no more than 10% of the house value.

5. **Stocks and bonds.** The prices and descriptions for stocks and bonds may be obtained from monthly brokerage statements. You can put on the Probate Worksheet "See attached" and bring in the statements. If you wish the attorney to assist with stock transfer documents, there will be an additional fee for this service.

6. **Automobile.** Use "blue book" price. (We can do this for you for a small additional fee).

7. **Bank, Credit Union Accounts.** List all accounts whether in the deceased's

name or not, unless the account is the separate property of the surviving spouse. "Separate property" is property the deceased owned before marriage or property deceased inherited from a family member. Just because an account is in only one (1) name does not make it that person's separate property. If you are unsure, list the account and we will discuss it.

8. **Property Outside of Louisiana.** If you have property in other states it may be necessary to have an "ancillary" proceeding done by a lawyer in the other state. You should bring in the legal description of the out-of-state property and we can determine if an ancillary probate will be necessary. Recording of documents in other states does require additional costs and fees, some states require that you have a lawyer in that state.

9. **Taxes.** If the estate is under \$5.25 million for deaths occurring after December 31, 2012, only a Louisiana return will be needed. Spouses are exempt from inheritance taxes in Louisiana. If a federal return is necessary, I will let you know. If your estate exceeds \$5 million we should discuss means to reduce federal estate taxes. This will include a discussion of family partnerships, trusts, and other estate planning tools. The costs for these services varies, and will be quoted upon a further discussion of your needs.

10. **Attorney's Fees and Costs.** The average succession fees, which include probate, state inheritance tax filing, and completion of the succession are \$1,200. This does not include court costs which are \$450 for Caddo Parish or \$400 and up for Bossier Parish. I can give you a costs estimate for other parishes. It is usually \$250 and up. I will tell you exactly how much the costs and fees will be when we have our first meeting.

11. **Information on Preparation of Other Legal Documents.** If I do your probate, then I will also review your current will to see whether a new will is in order. I normally do not charge to just review your will. You may also need to give someone your Power of Attorney, a Power of Attorney for Healthcare, and a Living Will. I will give you a quote to do all of these documents.

If there are any areas on the Probate Worksheet that you do not understand, feel free to give me a call and ask any questions regarding filling out the form. If you get to the point that you cannot complete any more of the form, just make an appointment to come in with the form not fully complete. Since every succession is different, there may be areas on the form that do not apply to your situation. If they do not apply, either leave them blank or put not applicable. If you have a question about a particular area on the worksheet and want to go ahead and come in, just put a question mark by any area you have a problem with and we will go over it at our initial meeting.

It normally takes at least two (2) months to complete the succession. This two (2)

months from the time that I get all of the information that I need to handle the succession.

Please feel free to call with any questions or comments.

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