

**CHRISTIE TOURNET**  
& ASSOCIATES, LLC

1795 W. CAUSEWAY APPROACH, SUITE 103A  
 MANDEVILLE, LOUISIANA 70471  
[christie@tournetlaw.com](mailto:christie@tournetlaw.com)

OFFICE: 985-951-2177  
 FAX: 985-951-2178  
[www.tournetlaw.com](http://www.tournetlaw.com)

**Succession Information Form**

**Information About the Decedent**

Full Legal Name and advise if Decedent had a Will	
Address at Time of Death and length of time at address	
Marital Status	
Full Name of current Spouse and list any prior Spouse(s)	
Did the Decedent have any children? If so, provide names and birthdates, please	

**Real Estate Owned**

Address and description (family home? Vacant lot?):	Best Estimated Value at Death (and Source for value):	Any Mortgage or Lien? And if so, Balance at date of death.	Titled in Decedent's name alone, or with others? If others, indicate whom:

**Vehicles, Boats, and Trailers Owned**

Year, Make, Model	VIN:	Value at Death	Balance of Lien?

**Bank and Financial Accounts**

Bank /Financial Entity and Location	Account Number	Balance at Death


**Decedent's Debts, if any**

Creditor Name and Location	Account Number	Balance

**Burial Plot/Pre-Paid Funeral Plan** (are they titled correctly?)

Location	Best Estimated Value:

**Other Property** (stocks, bonds, mutual funds, mineral leases, jewelry, art, etc.)

Description & Details	Balance/Value	Decedent's Share of Balance/Value
1. Household furnishings:		

**Funeral & Burial Expenses**

Provider	Amount Paid	Pre-Paid by Decedent?
		Y N

**Other Known Heirs**

Names:	Address and best contact info/method:	Heir's Date of Birth:

**\*\*Do any of the above heirs have a mental or physical disability or receive government benefits for which an inheritance could disrupt? Y / N**

**\*\*Are there any heirs for which their location/whereabouts are unknown? Y / N**

**Checklist of Required Documents to File Succession:**

- \_\_\_ Original Will, if applicable
- \_\_\_ Original Death Certificate
- \_\_\_ Legal description for real estate. This could be Act of Sale/Donation or Judgment of Possession.
- \_\_\_ Copies of title or registration for any vehicle, or the VIN.
- \_\_\_ Copies of bank statements or investments which include dates close to decedent's date of death.