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Succession Information Form

Information About the Decedent

1. Please provide:
 - a. Full name of Decedent: _____
 - b. Did Decedent have a Will: _____
 - c. Date of Death: _____; Parish of Death: _____
 - d. Address at time of Death: _____
 - e. Marital Status: _____
 - f. Full Name of Current Spouse: _____
 - g. Any Prior Spouse's Name(s): _____

2. Please provide Decedent's children's full names, birthdate, and contact information, including any children that may have predeceased and their issue (attach additional sheet with information, if needed):
 - a. Child: _____, DOB: _____, Email: _____
 Address: _____, Phone: _____
 - b. Child: _____, DOB: _____, Email: _____
 Address: _____, Phone: _____
 - c. Child: _____, DOB: _____, Email: _____
 Address: _____, Phone: _____
 - d. Child: _____, DOB: _____, Email: _____
 Address: _____, Phone: _____

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

1. Did Decedent own an interest in any business? Y / N

If yes, please describe: _____

2. Are there any digital assets that need to be accessed? Y / N

If yes, please describe: _____

3. Is there a Safe Deposit Box? Y / N

4. Are there any rents, notes, or accounts receivable due to the Decedent? Y / N

If yes, please describe: _____

Decedent's Debts, if any

Creditor Name and Location	Account Number	Balance

1. Does anyone need to be reimbursed for any expenses, such as legal fees for the succession or funeral/burial expenses? Y / N

If so, who and for what amount? _____

2. Are the heirs going to reimburse this sum amongst themselves? Y / N

If not, do we need to direct a financial institution to reimburse and if so, which financial institution?

3. Did Decedent receive Medicaid at any time? Y / N If yes, when? _____

4. Did Decedent have any credit life insurance available? Y / N

If yes, please describe: _____

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, Email Address, and Telephone:	Date of Birth:

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

2. 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.
- ___ Supporting Documents for Real estate and business valuations – could be an appraisal, recent deed, a broker price opinion, and/or a Tax Assessor valuation.
- ___ 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.