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Succession Information Form

Information About the Decedent

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

2. Please provide Decedent's children's full names, birthdates, and contact information, including any children that may have predeceased (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, please: |
|---|---|--|--|
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|--|--|--|--|
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|--|--|--|--|

Vehicles, Boats, and Trailers Owned:

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

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: _____

5. Did you file the Decedent's tax return for the last calendar year? Y / N.

And, for the year the Decedent passed? Y / N.

** If not, please engage a CPA to handle both.**

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.