



**II. DECEDENT'S HEIRS**

**A. Surviving Spouse**

\_\_\_\_\_  
Name (first, middle, last)      Birthdate      address, city, state, zip  
**If survived by a spouse, is the decedent's spouse a United States citizen?** \_\_\_\_\_

**B. Children** (if no living children, list parents; if no living parent(s), list siblings)

Name (first, middle, last)	Birthdate (dd/mm/yyyy)	Mailing Address address, city, state, zip	Deceased? yes/no
1. _____	_____	_____ _____	_____
2. _____	_____	_____ _____	_____
3. _____	_____	_____ _____	_____
4. _____	_____	_____ _____	_____
5. _____	_____	_____ _____	_____

Please note below whether any of the above named persons has been declared incompetent or incapacitated (i.e. has a guardian appointed for them) and whether any minors have been emancipated. If above-listed persons are not the children of the decedent, please list the relationship of each to the decedent below. Please also include any additional information about any of the above heirs which may be relevant, such as whether a child is adopted, etc.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



**ASSETS OF DECEDENT (continued) E.**

**Stocks, Bonds & Mutual Fund Accounts**

(attach copies of statements for the month preceding date of death and the month containing the date of death)

Name of Institution	Address	Approximate Value
1.		\$ .00
2.		\$ .00
3.		\$ .00

**F. Retirement Plans** (not already listed above) (e.g. 401(k), IRA, Roth IRA)

(attach copies of statements for the month preceding date of death and the month containing the date of death; and in the case of a qualified plan, the summary plan document)

Name of Institution	Acct. Type	Beneficiary	Approximate Value
1.			\$ .00
2.			\$ .00
3.			\$ .00
4.			\$ .00

**G. Real Property** (please provide copies of deeds and P&C insurance policies if available)

Name of Institution	Address	Approximate Value
1.		\$ .00
2.		\$ .00
3.		\$ .00
4.		\$ .00

Please note if any real property was jointly held or not owned by decedent in fee simple:

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**H. Automobiles** (please provide copies of title and P&C insurance policies if available)

Make, Model & Year	Property and Casualty Insurer	Approximate Value
1.		\$ .00
2.		\$ .00
3.		\$ .00
4.		\$ .00

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**I. Other Vehicles** (motorcycles, boats, personal watercraft, airplanes, etc.)

(please provide copies of title and P&C insurance policies if available)

Description	Property and Casualty Insurer	Approximate Value
1.		\$ .00

**J. Valuable Personal Property** (over \$500.00 in value; e.g. jewelry, paintings, antiques, etc.)  
 (attach separate list if necessary)

Description	Approximate Value
1. _____	\$ .00
2. _____	\$ .00
3. _____	\$ .00
4. _____	\$ .00
5. _____	\$ .00

**K. Business Interests**

Name of Business	Shares/Units/ Membership Interest	Entity Type	Approximate Value
1. _____			\$ .00
2. _____			\$ .00

If any Business Interests listed above are corporations, are any taxed as S Corporations? Yes \_\_\_ No \_\_\_  
 Do in-force buy/sell agreements apply to any Business Interests listed above? Yes \_\_\_ No \_\_\_

**L. Accounts over which Decedent was Custodian**

1. _____	\$ .00
2. _____	\$ .00

**M. Other Assets Not Listed Above** (cemetery lots, time shares, notes receivable, etc.)

Description	Approximate Value
1. _____	
2. _____	

**N. Safe Deposit Box**

Please attach a summary of the contents of any safe deposit boxes which have already been opened. Please list the institution and location of any additional boxes and whether or not you have the key.

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## V. DEBTS OF THE DECEDENT

For each of the following categories, please note whether the obligation has been paid or not and note at the end of this section whether any of the listed debts are disputed.

### A. Funeral Expenses

Creditor	(paid/not paid)	Amount Owed/Paid
1. _____		
2. _____		

### B. Expenses of Last Illness

Creditor	(paid/not paid)	Amount Owed/Paid
1. _____		
2. _____		

### C. Taxes Owed

Government Entity	type (e.g. income, property)	Amount Owed/Paid
3. _____		
4. _____		

### D. Secured Creditors (mortgages, car loans, etc.)

Creditor	Collateral Property	\$ Amount Owed
1. _____		\$ .00
2. _____		\$ .00
3. _____		\$ .00
4. _____		\$ .00

### F. Unsecured Creditor (credit cards, loans, utilities)

1. _____	\$ .00
2. _____	\$ .00
3. _____	\$ .00
4. _____	\$ .00

OTHER INFORMATION

- 1. Did the decedent receive Medicaid at any time during life? ..... Yes \_\_\_ No \_\_\_
- 2. Was the decedent the beneficiary of any trusts? ..... Yes \_\_\_ No \_\_\_
- 3. Was the decedent the grantor of any trusts? ..... Yes \_\_\_ No \_\_\_
- 4. Are any of decedent's assets:
  - subject to rapid or severe deterioration?..... Yes \_\_\_ No \_\_\_
  - especially susceptible to theft, destruction, damage or injury ..... Yes \_\_\_ No \_\_\_
  - located in a storage unit?..... Yes \_\_\_ No \_\_\_
- 5. Was the decedent required to file tax returns with any other state or country?..... Yes \_\_\_ No \_\_\_
- 6. Was the decedent a veteran? ..... Yes \_\_\_ No \_\_\_
- 7. Do you anticipate that anyone is likely to contest decedent's will?..... Yes \_\_\_ No \_\_\_
- 8. Was the decedent involved in any pending litigation? ..... Yes \_\_\_ No \_\_\_
- 9. Are you aware of the decedent right to sue on any cause of action?..... Yes \_\_\_ No \_\_\_
- 10. Has any property listed on this form been formally appraised recently? Yes \_\_\_ No \_\_\_
- 11. Did the decedent own any real property outside Georgia? Yes \_\_\_ No \_\_\_
- 12. Did the decedent own any property outside the United States? Yes \_\_\_ No \_\_\_

If the answers to any of the above questions are "yes" please provide details below.

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