



BATTAGLIA & WALTARI
Attorneys at Law

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PRELIMINARY ESTATE INFORMATION FORM

1. Full name or names of decedent: _____

a. Address at time of death: _____

b. Location of property: _____

c. Business address at time of death: _____

d. Out-of-state residence (place and duration of stay):

2. Date and place of birth (or date and place of naturalization):

3. Date and place of death (city, county, and state): _____, 20____;

4. Marital and family information

a. Name of spouse: _____

b. Date and place of marriage: _____, 19__/200__;

c. Children (name and birthdate; if any children legally adopted, provide name of court, dates, and copies of adoption decrees):

d. Prior marriage(s), if any, of decedent and spouse. In each case, provide the following:

(1) Name of former spouse: _____

(2) Date and court in which marriage terminated; name and number of case, if known:

(3) Attorney of record (name, address, phone number): _____

(4) Location of copy of divorce judgment: _____

(5) Children of former marriage (name and birthdate of each, and whether adopted by you; place of residence of children, if not with you):

5. Nonmarital relationships:

a. Name of partner: _____

b. Inclusive dates of relationship: _____

c. Partner making any claim? _____

d. Written or oral property agreements? _____

Terms:

6. Personal representative(s), including alternates and successors [name(s), address(es), telephone number(s), Social Security Number(s), and driver's license state(s)/number(s)]:

7. Location of will, and whether or not an original: _____

8. Witnesses to will (names and current addresses):

9. Heirs and beneficiaries (names, ages, relationship, addresses, and telephone numbers):

a. Beneficiaries of will or intestate heirs:

b. Relatives who are not beneficiaries:
