

# GEER & ASSOCIATES, P.C.

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<b>New Client - Probate of Will Intake Form</b>	
<b>CLIENT</b>	<b>DECEDENT</b>
Name:	Name:
Residence Address:	Residence Address:
City, State, Zip:	City, State, Zip:
Phone #:	last 3 digits SSN:                      last 3 digits DL:
Alt Phone #:	Date of Death:                      Age at death:
Email Address:	Place of Death:
last 3 digits SSN:                      last 3 digits DL:	Original Will brought?                      Death Certificate brought?
Notes:	Names of Witnesses on will:
	Estimated value of Estate:
<b>BENEFICIARY INFORMATION</b>	
Name:	Name:
Relationship to Decedent:	Relationship to Decedent:
Street Address:	Street Address:
City, State, Zip:	City, State, Zip:
Phone #:	Phone #:
Email address:	Email address:
Name:	Name:
Relationship to Decedent:	Relationship to Decedent:
Street Address:	Street Address:
City, State, Zip:	City, State, Zip:
Phone #:	Phone #:
Email address:	Email address:

**ESTIMATED ASSETS****Real Property**

Residence Address:

Other RP Address:

City, State, Zip:

City, State, Zip:

Approximate Value: \$

Approximate Value: \$

**Financial Assets**

Name of Fiduciary:

Name of Fiduciary:

Type of Account:

Type of Account:

Last 4 digits of Acct #:

Last 4 digits of Acct #:

Acct Bal on DOD: \$

Acct Bal on DOD: \$

Name(s) on Account:

Name(s) on Account:

Beneficiaries designated:

Beneficiaries designated:

Name of Fiduciary:

Name of Fiduciary:

Type of Account:

Type of Account:

Last 4 digits of Acct #:

Last 4 digits of Acct #:

Acct Bal on DOD: \$

Acct Bal on DOD: \$

Name(s) on Account:

Name(s) on Account:

Beneficiaries designated:

Beneficiaries designated:

Life Insurance

Stocks/Bonds

Name of Insurer:

Name of Broker:

Last 4 digits of acct #:

Last 4 digits of Acct #:

Value at DOD: \$

Value at DOD: \$

**Personal Property**

Vehicle

Vehicle

Year/Make/Model:

Year/Make/Model:

Mileage

Mileage

VIN:

VIN:

Approximate Value

Approximate Value

