

# PROBATE INTAKE FORM

Please Bring **Original** Last Will and Testament to appointment or mail to:

Stanfield & Dupre, PLLC  
1095 Evergreen Circle, Suite 200  
The Woodlands, Texas 77380

## DECEDENT:

Name: \_\_\_\_\_  
Date of Birth: \_\_\_\_\_  
Date of Death: \_\_\_\_\_  
Street Address: \_\_\_\_\_  
City and State: \_\_\_\_\_  
County: \_\_\_\_\_  
County of Death: \_\_\_\_\_  
Street Address: \_\_\_\_\_  
City and State: \_\_\_\_\_  
Social Security #: \_\_\_\_\_  
Driver's License #: \_\_\_\_\_

## APPLICANT:

Name: \_\_\_\_\_  
Phone #: \_\_\_\_\_  
Email: \_\_\_\_\_  
Street Address: \_\_\_\_\_  
City and State: \_\_\_\_\_  
Social Security #: \_\_\_\_\_  
Driver's license #: \_\_\_\_\_  
Relationship: \_\_\_\_\_

# PROBATE INTAKE FORM

Is there a Will?                       Original       Copy       Neither

Please attach the Follow:

The Last Will and Testament of Decedent

A copy of the Decedent's Death Certificate

A copy of Applicant's and Decedent's Driver's License

A copy of Applicant's and Decedent's Social Security Cards

## SPOUSE(S) OF DECEDENT:

Name: \_\_\_\_\_

Phone #: \_\_\_\_\_

Email: \_\_\_\_\_

Street Address: \_\_\_\_\_

City and State: \_\_\_\_\_

Name: \_\_\_\_\_

Phone #: \_\_\_\_\_

Email: \_\_\_\_\_

Street Address: \_\_\_\_\_

City and State: \_\_\_\_\_

## CHILDREN OF DECEDENT:

Child #1:

Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Email Address: \_\_\_\_\_

Is the Child a minor                       Yes                       No

Was the child adopted                       Yes                       No

# PROBATE INTAKE FORM

Child #2: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Email Address: \_\_\_\_\_

Is the Child a minor:       Yes       No

Was the child adopted       Yes       No

Child #3: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Email Address: \_\_\_\_\_

Is the Child a minor:       Yes       No

Was the child adopted       Yes       No

# PROBATE INTAKE FORM

## **ASSETS:**

**(Please include approximate values)**

1. Non-retirement Plan Cash and Investments

--

2. Real Estate

--

3. Business Interests

--

4. Life Insurance

--

5. Retirement plans

--