

Confidential

Probate Data

Decedent's Name: _____

Client Name: _____

Date Completed: _____

IMPORTANT: Please complete these forms prior to your first appointment. They are available online as well. Just ask us to email you a copy.



315 N Main St
Davison, Michigan 48423

(810) 653-9333
sean@obryanlaw.com

Decedent's Full Name: _____

Full Social Security Number: _____

Last Address: _____

Date of Birth: _____ Date of Death: _____

Marital Status at Death : _____ Number of Children: _____

Applicant's Legal Name: _____

Relationship to the Decedent: _____

Home Address: _____

Date of Birth: _____ Social Security Number: _____

Home Phone: _____ Cell Phone: _____

Email Address: _____

Heirs

Heir One:

Full Legal Name: _____

Relationship: _____

Home Address: _____

Phone: _____ DOB: _____ Age: _____

SS# Last 4: _____ Special Needs of Concerns: _____

Heir Two:

Full Legal Name: _____

Relationship: _____

Home Address: _____

Phone: _____ DOB: _____ Age: _____

SS# Last 4: _____ Special Needs of Concerns: _____

Heir Three:

Full Legal Name: _____

Relationship: _____

Home Address: _____

Phone: _____ DOB: _____ Age: _____

SS# Last 4: _____ Special Needs of Concerns: _____

Heir Four:

Full Legal Name: _____

Relationship: _____

Home Address: _____

Phone: _____ DOB: _____ Age: _____

SS# Last 4: _____ Special Needs of Concerns: _____

Heir Five:

Full Legal Name: _____

Relationship: _____

Home Address: _____

Phone: _____ DOB: _____ Age: _____

SS# Last 4: _____ Special Needs of Concerns: _____

Heir Six:

Full Legal Name: _____

Relationship: _____

Home Address: _____

Phone: _____ DOB: _____ Age: _____

SS# Last 4: _____ Special Needs of Concerns: _____

***Note: If you have additional heirs, just added extra pages,
and answer the same questions for each.***

Additional Information

If there was a Will, is anyone named in the Will unrelated by blood or marriage to the person who died?

Was anyone disinherited?

✓ Have you provided the original Will? _____

✓ Have you provided an original Death Certificate? _____

Do you have any questions you would like to write down here to discuss with Sean O'Bryan during your next appointment?

Documentation Needed

1. Three certified copies of the death certificate or as many as necessary for transferring assets.
2. Legal documents:
 - copy of the decedent's birth certificate, last will, codicils, trusts,
 - handwritten/typed lists of personal property,
 - prenuptial/marital agreements,
 - child support orders,
 - life insurance policies, beneficiary designations,
 - buy/sell agreements, operating agreements,
 - contracts/notes, deeds,
 - land contracts, loan agreements,
 - title to automobile, boats, etc.
3. Financial documents: any information available describing the decedent's assets and liabilities, such as:
 - reoccurring bills,
 - bank statements,
 - investment reports,
 - copies of bonds, stocks,
 - mortgages,
 - income tax returns,
 - business records,
 - real estate documents,