



www.heritagelawtx.com

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Phone: (512) 930-0529

PROBATE INTAKE

Today's Date: _____

Your Full Name: _____ Your e-mail address: _____

Address: _____

City/State/Zip: _____

Cell Phone: _____ Work Telephone: _____

Driver's License #: _____ Birthdate: _____

Social Security #: _____ Sex: M F

Decedent's Full name: _____

Date of Birth: _____ Date of Death _____

Address of Decedent: _____ County: _____

Where did Decedent pass (city, county, state)?; _____

Who is listed as Executor of the Will?: _____

Decedent's Social Security #: _____ - _____ - _____

Property owned by Decedent:

Home: _____

Bank Accts: _____ checking ___ savings ___ Approx Balance: _____

_____ checking ___ savings ___ Approx Balance: _____

Vehicle year, make, model: _____ VIN: _____

IRAs/401ks: _____

[attach additional pages / documents if necessary]

Name, address, email address & phone # for beneficiaries:

1. _____

2. _____

3. _____

How Were You Referred to Heritage Law?: _____

Who Will Be Responsible for Your Account With Us?: _____

Have you seen another attorney about this matter? _____ If yes, who? _____

Name and phone number of person, not currently living with you, to contact in case of an emergency:

OTHER CONCERNS OR COMMENTS WHICH YOU FEEL WILL BE HELPFUL TO THE ATTORNEY :