ZEIGLER & ASSOCIATES, PC
Attorneys & Counselors at Law

PROBATE PLANNING QUESTIONNAIRE

INFORMATION AND DOCUMENTS REQUESTED FOR INITIAL MEETING

Information regarding the Decedent:

1. All deeds for all real estate with addresses for each property owned.
2. All tax bills for all real estate.
3. All land contracts and/or mortgages held.
4. All accounts receivable (people, children who owe the Decedent money); and all accounts payable (creditors to whom the Decedent owes money).
5. All investment account statements including US savings bonds, stocks, bonds, mutual funds, etc.
6. All leases: auto, equipment, real estate.
7. All bank accounts (checking, savings, certificates of deposit, etc.) including the current checkbook register.
8. All life insurance policies and annuity information.
9. All retirement plan information.
10. Will.
11. Trust.
12. Tax returns - most recent:
    - For individuals - Form 1040
    - For businesses - Form 1120
13. Divorce Judgment, if relevant.
14. Names and addresses of the following:
    a. Decedent's spouse, if any, and surviving children and issue of deceased children, if any;
    b. if no surviving spouse, children, or grandchildren, Decedent's surviving parents;
    c. if no surviving parents, the brothers and sisters of Decedent and the children of deceased brothers and sisters; and
    d. If none of the above, determine who the heirs are under MCL 700.2103(d).
15. Decedent's vital documents (e.g., birth certificate, death certificate, if available).
16. Social Security numbers of all who will receive a distribution from the estate (if estate tax returns are required).
17. Safe Deposit Box information.