The Law Office of Kenneth S. Federman, LLC

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Estate of ____________________

Information Request

Date of Death: _______________

Sensitive Estate Issues:

Surviving Spouse US citizen?

Any fiduciaries non UN citizens?

Any S Corps?

Any Retirement Plans?

Payable to Trusts

Payable to individuals

Payable to others

Kindly complete the following as best you can. If there is something that you are unsure of, please provide the information that you can. You can attach photocopies of documents as well. Many of the questions may not apply; additional questions may surface.

Kenneth S. Federman, Esquire
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I. **Personal Information**

A. Full name of decedent: ______________________________

B. Other names (aka): ______________________________

C. Please attach 3 certified death certificates, if available.

D. Was decedent a US Citizen? Yes No

E. Principal residence: ______________________________

F. Additional Information: ______________________________

II. **Decedent's Spouse**

A. Was decedent married at the time of death? Yes No

1. If yes, name of spouse: ______________________________

(a) Is the surviving spouse a US citizen by birth? Yes No

(b) Is the surviving spouse a US citizen by naturalization? Yes No

B. Was decedent previously married? Yes No

C. Were there any Ante-Nuptial Agreements? Yes No If so, please attach a photocopy.

D. Additional Information: ______________________________

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III. **Estate Planning Documents**

A. Please attach the decedent's original estate planning documents (Will, Codicils, Trusts, Ante-Nuptial Agreements, etc.)

B. Please list the title of each attached document:

1. ______________________________
2. ______________________________
3. ______________________________
4. ______________________________

5. ____

6. ____

7. ____

8. ____

C. Are there any prior wills or other documents?

D. Does decedent have any beneficial interest in any trusts?

E. Does decedent have any authority over any other trusts (trustee, power of appointment, power to change trustees, power to withdraw assets, etc.?)
Yes No

IV. **Family Members**

A. Please attach a sheet listing name, address, social security number (if available) and relationship of all of decedent's children and grandchildren.

B. Did decedent have any children who predeceased the decedent?

C. Where any of decedent's children or grandchildren adopted into the family?

D. Where any children or grandchildren adopted out of the family?

V. **Lifetime Gifts**

A. Has decedent made any gifts during his/her lifetime? Yes No

B. Has decedent filed any gift tax returns? Yes No (Please attach copies, if available)

C. Has decedent made any gifts during his/her lifetime for which gift tax returns were required but not filed? Yes No

VI. **Business Interests**

A. Did decedent have any interest in any business entities? Yes No

B. If so, please describe

VII. **Tangible Personal Property**

A. Please prepare a list of tangible personal items. Please estimate the value of the tangible personal items. If any are distributed, please maintain a list indicating he beneficiary of each such item.

B. Did decedent own a motor vehicle or water vehicle? Consult ins co/agent.

VIII. **Non-retirement Assets**

A. Please list the non-retirement assets and accounts in which decedent held an interest (including joint accounts) and the approximate value of each. Attach recent statements if possible.

IX. **Retirement Accounts**

A. Please list the retirement assets and accounts in which decedent held an interest and the approximate value of each. Attach recent statements and copies of the current beneficiary designations, if possible.