

**Confidential Probate Information**  
**RUSHFORTH LEE & KIEFER LLP**  
**A Nevada Limited-Liability Partnership**

**I. Decedent.** (Provide a certified copy of the death certificate with this questionnaire.)

Name of Decedent	Domicile (City, County, State)	Death Date	Soc. Sec. No.
	<input type="checkbox"/> Clark Co., NV		

**II. Client.**

Your Name / Relationship to Decedent	Mailing Address	Telephones	Soc. Sec. No. <sup>1</sup>
		Home	
		Cell	
Check all that apply: <input type="checkbox"/> Spouse; <input type="checkbox"/> Child; <input type="checkbox"/> Will beneficiary; <input type="checkbox"/> Heir; <input type="checkbox"/> Contestant; <input type="checkbox"/> Creditor/Claimant; <input type="checkbox"/> Executor/Administrator	E-mail Address	Fax	PR's Birth Date:
		Other	

If you will seek appointment as personal representative:	Nominated by:	Title of Personal Representative
	<input type="checkbox"/> Will (Please provide original Will, including each codicil. <sup>2</sup> ); <input type="checkbox"/> Heir; <input type="checkbox"/> Last named executor; <input type="checkbox"/> Other (Specify:)	<input type="checkbox"/> Executor; <input type="checkbox"/> Administrator; <input type="checkbox"/> Administrator with the Will Annexed. <input type="checkbox"/> Co-fiduciaries, acting jointly.
Ancillary Administration	If you have been appointed as personal representative (executor or administrator) in another state, we will need a certified copy of the Court Order appointing you, together with a certified copy of your Letters Testamentary, Letters of Administration, or other court-issued document evidencing your appointment.	
Not named under a Will?	If named in the Will, the personal representative does not need to be a Nevada resident. If there is no Will, a Nevada resident must be either the personal representative or a co-personal representative. Our office can provide a personal representative or co-personal representative for no additional fee (other than the hourly charges) if you wish.	

**III. Miscellaneous Information.**

Other names used by decedent:	
Date of Last Will and any Codicils:	(Provide the original of the Will and each Codicil. If the Will and/or Codicil have been admitted to probate in another state, we will need a certified copy of each document, together with a certified copy of the Court Order admitting it to probate.)
Date of decedent's last marriage:	
Nature of property:	<input type="checkbox"/> All Community; <input type="checkbox"/> All separate; <input type="checkbox"/> Both.
Did the decedent make taxable gifts?	<input type="checkbox"/> Yes; <input type="checkbox"/> No;    (Provide copies of all filed gift tax returns, if any.)

<sup>1</sup> Your social security number will not be inserted into any public document. If you are a personal representative, it will be used in the application for a tax identification number for the estate. If you are a beneficiary of the estate, it will be provided to the personal representative, who will provide it to the Internal Revenue Service on required tax filings. The Firm's privacy policy can be found at <http://rlklegal.com/privacy.pdf>.

<sup>2</sup> If the most recent will is less than two years old and replaces a prior will, please provide us a copy of the prior will as well.

**IV. Heirs and Will Beneficiaries.** (Use additional pages if necessary. List surviving spouse, children, and the children of each deceased child. Great grandchildren and lower generations need be listed only if they have no living ancestor who is a descendant of the decedent. If there is no spouse and no descendant, list closest blood relatives. Include relatives by half-blood. Except for beneficiaries named in the Will, exclude foster- and step-relatives and in-laws.)

<b>Name of Heir or Will Beneficiary</b> (Include social security number only if we are preparing the estate tax return)	<b>Mailing Address</b>	<b>Birth Date (If Minor)</b>	<b>Relationship and Status</b>
			<input type="checkbox"/> Will Beneficiary
			<input type="checkbox"/> Will Beneficiary
			<input type="checkbox"/> Will Beneficiary
			<input type="checkbox"/> Will Beneficiary
			<input type="checkbox"/> Will Beneficiary
			<input type="checkbox"/> Will Beneficiary
			<input type="checkbox"/> Will Beneficiary
			<input type="checkbox"/> Will Beneficiary

**V. Assets and Fiduciary Bond.** (Give the approximate fair market value as of the date of death for each category. Subtract mortgages and other liens.)

<b>Nevada Real Property</b> <small>☞</small>	<b>\$</b>	<b>Nevada Personal Property</b> <small>☞</small>	<b>\$</b>	<b>Total Nevada Estate</b> <small>☞</small>	<b>\$</b>
<b>Bondable Amount:</b> <small>☞</small> Personal property + annual income			<b>\$</b>	<input type="checkbox"/> Will waives bond.	

Use the *Asset Checklist for Estate Administration* as a guideline to prepare a more complete estate inventory. <http://rlklegal.info/pdf/probinventory.pdf>.

**VI. Liabilities.** For the initial petition, give a brief synopsis of known liabilities. Provide only the information you know; do not guess. For purposes of the probate inventory and the giving of notice to creditors, please prepare a complete list of all known creditors of the decedent, such as credit card companies, banks that have extended loans, companies and individuals who are being paid in installments, and even family members who have loaned the decedent money. Also include any health-care providers and caregivers, even if you think their compensation has been paid or will be paid from insurance, Medicare, Medicaid, or other resources. Liabilities related to taxes, the decedent's funeral and burial, and the decedent's last illness should be clearly identified because they have a priority over other claims. (NOTE TO PERSONAL REPRESENTATIVE: Check with us before paying any creditor or claimant. If you pay a claimant before the court authorizes you to do so, and the estate is unable to pay all its claims, you may be personally liable if another claimant with a higher priority goes unpaid. If the estate is insufficient to pay all its claims, it may be advisable for you to decline to serve as personal representative and allow the creditors to take over the estate.)

**Office use only:**

Version of August 2018

<b>Proceeding:</b> <input type="checkbox"/> -Regular; <input type="checkbox"/> -Summary; <input type="checkbox"/> -Set Aside; <input type="checkbox"/> -Affidavit. <b>Tax Returns:</b> <input type="checkbox"/> -706; <input type="checkbox"/> -1041; <input type="checkbox"/> -709 <b>Letters:</b> <input type="checkbox"/> -Testamentary; <input type="checkbox"/> -Administration CTA; <input type="checkbox"/> -Administration. <input type="checkbox"/> -Disputed PR. <input type="checkbox"/> -Will contest or disputed distribution. <input type="checkbox"/> -Blocked Account. <input type="checkbox"/> -Attorney Trust Account.
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