

GOOD, BUCY & ELSON  
Probate Questionnaire

**Information about the Decedent:**

Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Mailing Address: \_\_\_\_\_ Social Security #: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Date of Death: \_\_\_\_\_ Age at Death: \_\_\_\_\_

Place of Death: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Do you have the Decedent's original Will? \_\_\_\_\_ If NO, can you get original Will? \_\_\_\_\_

Do you have a certified copy of the Decedent's death certificate? \_\_\_\_\_ (If no, you will need to obtain one).

**Information about the Personal Representative:**

Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_ Age: \_\_\_\_\_

Mailing Address: \_\_\_\_\_ Phone #: \_\_\_\_\_

E-Mail Address: \_\_\_\_\_ Social Security #: \_\_\_\_\_

Have you ever been convicted of a felony? \_\_\_\_\_

If Yes, please explain:

\_\_\_\_\_  
\_\_\_\_\_

Are you a licensed funeral service practitioner? \_\_\_\_\_

Are any of your relatives licensed funeral service practitioners? \_\_\_\_\_

If yes, please explain:

\_\_\_\_\_  
\_\_\_\_\_

Were you ever a member of the Oregon State Bar? \_\_\_\_\_ If yes, were you ever  
suspended or disbarred? \_\_\_\_\_

Are you a competent person over the age of 18? \_\_\_\_\_

**Decedent's Assets** (Please list the decedent's assets):

Bank and Investment Accounts: (e.g., checking, savings, IRA's, etc.)

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Real Property: (e.g., home, investment properties)

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Personal Property: (e.g., household items, furniture, clothing, vehicles)

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Were the assets listed above owned solely or jointly by the decedent? Please explain:

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Are there beneficiary designations on any of the decedent's bank/investment or retirement accounts?  
Please explain:

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**Information about Heirs and Devisees:**

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**Please list all heirs to the decedent:**

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Address: \_\_\_\_\_

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Address: \_\_\_\_\_

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Address: \_\_\_\_\_

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Address: \_\_\_\_\_

**Names, addresses and relationships of ALL devisees to the decedent:**

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