

## Questions Regarding the Estate of a Deceased Person

Name of person completing questionnaire: \_\_\_\_\_  
Mailing Address: \_\_\_\_\_  
Street Address (if different from above): \_\_\_\_\_

Home Phone No.: \_\_\_\_\_  
Work Phone No.: \_\_\_\_\_  
Cell Phone No.: \_\_\_\_\_

Name of deceased person: \_\_\_\_\_  
Date of death: \_\_\_\_\_  
Last known address of deceased: \_\_\_\_\_

Reason for contacting the Spartanburg County Probate Court:

- To file a Will
- To be appointed as Personal Representative
- Other: \_\_\_\_\_

Please answer YES or NO to the following questions.

1. Did the decedent reside in Spartanburg County? \_\_\_\_\_
2. Did the decedent have a will, codicil or memorandum? \_\_\_\_\_
3. Did the decedent own any real estate (land and/or building)? \_\_\_\_\_
4. Did the decedent own any stocks/bonds in **his/her name only**? \_\_\_\_\_
5. Did the decedent own any bank accounts **in his/her name only**? (checking, savings, CD, and/or money market accounts) \_\_\_\_\_
6. Did anyone owe the decedent money on a note or mortgage because they purchased property from the decedent? \_\_\_\_\_
7. Did anyone owe the decedent money? (including a refund check) \_\_\_\_\_
8. Did the decedent own a life insurance policy in which the beneficiary is the estate or someone who is deceased? \_\_\_\_\_
9. Did the decedent own any personal property which requires a title of ownership? (vehicle, boat, motor, camper, etc.) \_\_\_\_\_
10. Did the decedent own an annuity, IRA, 401K, or any other type of retirement account? \_\_\_\_\_
11. Did the decedent rent a safe deposit box? \_\_\_\_\_
12. Did the decedent rent a post office box? \_\_\_\_\_
13. Did the decedent commence any lawsuits before his/her death which are still pending? \_\_\_\_\_
14. Will there be a lawsuit commenced because of the decedent's death? \_\_\_\_\_
15. Was a conservator/guardian ever appointed for this person? \_\_\_\_\_
16. Do you desire to open the estate solely to acquire medical records? \_\_\_\_\_