Questions Regarding the Estate of a Deceased Person

Name of person completing questionnaire: ____________________________
Home Phone No.: ____________________________
Mailing Address: ____________________________
Work Phone No.: ____________________________
Street Address (if different from above): ____________________________
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? ________