SUCCESSION INFO LIST CCT#

 Type of succession:

 Administration: \_\_\_\_\_\_\_\_\_\_\_\_\_\_ JOP: \_\_\_\_\_\_\_\_\_\_\_\_

Fee quote: $2,500 plus filing fees

|  |  |
| --- | --- |
| Name of deceased |   |
| Social Security # |  |
| Death Certificate |  |
| Date of death |  |
| Place of death |  |
| Address: |  |
| Marital history |  |
| Number of Children |  |
| Circumstance of death |  |
| Will | Y N | No will | Y N |

|  |  |  |  |
| --- | --- | --- | --- |
| Heir #1 |  | SS# |  |
| Address |  |
| Phone# |  | Email |  |
| Marital history |  |
| How related |  |
| Age |  |

Notes \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

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|  |  |  |  |
| --- | --- | --- | --- |
| Heir#2 |  | SS# |  |
| Address |  |
| Phone# |  | Email |  |
| Marital history |  |
| How related |  |
| Age  |  |

Notes \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

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|  |  |  |  |
| --- | --- | --- | --- |
| Heir#3 |  | SS# |  |
| Address |  |
| Phone# |  | Email |  |
| Marital history |  |
| How related |  |
| Age  |  |

Notes \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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