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

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