



826 BrooksideAve., Suite C • Redlands • California • 92373 • (909) 335-0155

Probate Worksheet

Name: _____
Address: _____ Phone # _____
DOB: _____ SS#: _____

Will this probate be dealing with real or personal property? _____

Decedent's Name: _____
Date of Death: _____ Place of Death: _____

Was the decedent a resident of this county at the time of death? **YES** **NO**

Did the decedent have a will? **YES** **NO**
(If yes please include a copy of the will with this worksheet)

The gross value of all real and personal property in decedent's estate located inn Ca does not exceed \$100,000.00. **YES** **NO**

The decedent is survived by (check at least one box in each of items (1) – (3))

- 1. spouse no spouse as follows: divorced or never married spouse deceased
- 2. child as follows: natural/adopted natural adopted by a 3rd party no children
- 3. issue of predeceased child no issue of predeceased child

Decedent is is not survived by a stepchild or foster child or children who would have been adopted by decedent but for legal barrier

Please check the first box that applies:

- Decedent is survived by a parent or parents who are listed below
- Decedent is survived by a brother, sister, or issue of a deceased brother or sister, all of whom are listed below
- Decedent is survived by other heirs under Probate Code section 6400 et seq. all of whom also listed below
- Decedent is survived by no known next of kin.

Name & Relationship	Age	Residence or mailing address
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Please list any real property is the space below. Include any and all legal descriptions such as Assessor's Parcel Number (APN).

Description	Approximate Value
_____	\$ _____
_____	\$ _____

_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

Please list any personal property below.

Description	Approximate Balance
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

If there is anything in addition that you would like to add and you feel that it was not covered above please list it below:

ACKNOWLEDGMENT AND AUTHORIZATION

I understand that the Legal Document Assistant (LDA) preparing my documents is NOT an attorney, cannot select forms and DOES NOT give legal advice. I hereby direct the Legal Documents Assistant to type and perform certain services as outlined in our discussion(s). I further declare that the foregoing information which I have provided is, to the best of my knowledge, true and correct.

Dated:

Signature