

Confidential Probate Information
RUSHFORTH LEE & KIEFER LLP
A Nevada Limited-Liability Partnership

1. Decedent. (Provide a certified copy of the death certificate with this questionnaire.)

Name of Decedent	Domicile (City, County, State)	Death Date	Soc. Sec. No.
	<input type="checkbox"/> Clark Co., NV		

2. Client.

Your Name / Relationship to Decedent	Mailing Address	Telephones	Soc. Sec. No. ¹
		Home	
		Cell	
Check all that apply: <input type="checkbox"/> Spouse; <input type="checkbox"/> Child; <input type="checkbox"/> Will beneficiary; <input type="checkbox"/> Heir; <input type="checkbox"/> Contestant; <input type="checkbox"/> Creditor/Claimant; <input type="checkbox"/> Executor/Administrator	E-mail Address	Fax	PR's Birth Date: / /
		Other	

If you will seek appointment as personal representative:	Nominated by:	Title of Personal Representative
	<input type="checkbox"/> Will; <input type="checkbox"/> Heir; <input type="checkbox"/> Last named executor; <input type="checkbox"/> Other (Specify)	<input type="checkbox"/> Executor; <input type="checkbox"/> Administrator; <input type="checkbox"/> Administrator with the Will Annexed. <input type="checkbox"/> Co-fiduciaries, acting jointly.
Ancillary Administration	<i>If you have been appointed as personal representative (executor or administrator) in another state, we will need a certified copy of the Court Order appointing you, together with a certified copy of your Letters Testamentary, Letters of Administration, or other court-issued document evidencing your appointment.</i>	
Not named under a Will?	<i>If named in the Will, the personal representative does not need to be a Nevada resident. If there is no Will, a Nevada resident must be either the personal representative or a co-personal representative. Our office can provide a personal representative or co-personal representative for no additional fee (other than the hourly charges) if you wish.</i>	

3. Miscellaneous Information.

Other names used by decedent:	
Date of Last Will and any Codicils:	<i>(Provide the original of the Will and each Codicil. If the Will and/or Codicil have been admitted to probate in another state, we will need a certified copy of each document, together with a certified copy of the Court Order admitting it to probate.)</i>
Date of decedent's last marriage:	
Nature of property:	<input type="checkbox"/> All Community; <input type="checkbox"/> All separate; <input type="checkbox"/> Both.
Did the decedent make taxable gifts?	<input type="checkbox"/> Yes; <input type="checkbox"/> No; (Provide copies of all filed gift tax returns, if any.)

¹Your social security number will not be inserted into any public document. If you are a personal representative, it will be used in the application for a tax identification number for the estate. If you are a beneficiary of the estate, it will be provided to the personal representative, who will provide it to the Internal Revenue Service on required tax filings. The Rushforth Firm's privacy policy can be found at <http://rlklegal.com/privacy.pdf>.

4. **Heirs and Will Beneficiaries.** (Use additional pages if necessary. List surviving spouse, children, and the children of each deceased child. Great grandchildren and lower generations need be listed only if they have no living ancestor who is a descendant of the decedent. If there is no spouse and no descendant, list closest blood relatives. Include relatives by half-blood. Except for beneficiaries named in the Will, exclude foster- and step-relatives and in-laws.)

Name of Heir or Will Beneficiary (Include social security number only if we are preparing the estate tax return)	Mailing Address	Birth Date (If Minor)	Relationship and Status
			<input type="checkbox"/> Will Beneficiary
			<input type="checkbox"/> Will Beneficiary
			<input type="checkbox"/> Will Beneficiary
			<input type="checkbox"/> Will Beneficiary
			<input type="checkbox"/> Will Beneficiary
			<input type="checkbox"/> Will Beneficiary
			<input type="checkbox"/> Will Beneficiary
			<input type="checkbox"/> Will Beneficiary

5. **Assets and Bond.** (Give the approximate fair market value as of the date of death for each category. Subtract mortgages and other liens.)

Nevada Real Property <small>§</small>	\$	Nevada Personal Property <small>§</small>	\$	Total Nevada Estate <small>§</small>	\$
Bondable Amount: <small>§</small> Personal property + annual income		\$		<input type="checkbox"/> Will waives bond.	

Use the *Asset Checklist for Estate Administration* as a guideline to prepare a more complete estate inventory.

6. **Liabilities.** For the initial petition, give a brief synopsis of known liabilities. Provide only the information you know; do not guess. For purposes of the probate inventory and the giving of notice to creditors, please prepare a complete list of all known creditors of the decedent, such as credit card companies, banks that have extended loans, companies and individuals who are being paid in installments, and even family members who have loaned the decedent money. Also include any health care providers and caregivers, even if you think their compensation has been paid or will be paid from insurance, Medicare, Medicaid, or other resources. Liabilities related to taxes, the decedent's funeral and burial, and the decedent's last illness should be clearly identified because they have a priority over other claims. *(NOTE TO PERSONAL REPRESENTATIVE: Check with us before paying any creditor or claimant. If you pay a claimant before the court authorizes you to do so, and the estate is unable to pay all its claims, you may be personally liable if another claimant with a higher priority goes unpaid. If the estate is insufficient to pay all its claims, it may be advisable for you to decline to serve as personal representative and allow the creditors to take over the estate.)*

Office use only:

Version of June 2017

Proceeding: <input type="checkbox"/> -Regular; <input type="checkbox"/> -Summary; <input type="checkbox"/> -Set Aside; <input type="checkbox"/> -Affidavit. Tax Returns: <input type="checkbox"/> -706; <input type="checkbox"/> -1041; <input type="checkbox"/> -709 Letters: <input type="checkbox"/> -Testamentary; <input type="checkbox"/> -Administration CTA; <input type="checkbox"/> -Administration. <input type="checkbox"/> -Disputed PR. <input type="checkbox"/> -Will contest or disputed distribution. <input type="checkbox"/> -Blocked Account. <input type="checkbox"/> -Attorney Trust Account.

INVENTORY CHECKLIST FOR ESTATE ADMINISTRATION

Please provide the information requested.* Categorize assets in the groups shown below. Indicate any co-owners, and identify all community property. For co-owned property, provide each owner's interest and contributions. An appraised or verified value must be provided for each item as of the date of the decedent's death. As they become available, please provide copies of all appraisals and valuation opinions. For cash and securities, interest and dividends accrued to date of death must be listed. If an asset is subject to a liability, indicate both the gross value of the asset and the amount of the outstanding liability (as of the date of death). A federal estate tax return (IRS Form 706) is required for gross estates exceeding \$5,049,000 for decedents dying in 2017 and \$5,600,000 for decedent's dying in 2018, and the values reported on the Form 706 should match those shown on the probate inventory.

A.1. Real Estate (Even if mortgaged. Include all mineral and water rights, long-term leases, and deeded timeshares.)

- a. Legal description. (Provide copy of recorded documents, e.g., deed, mineral leases, homestead declaration, and water rights documents.)
- b. Type of property and street address (if any), city, county, and state.
- c. Assessor's parcel number from tax bill.
- d. Amounts owing on all mortgages, trust deeds, liens, and other encumbrances.

A.2. Real Estate Contracts (Property being purchased by the decedent on a contract. If possible, provide copy of contract.)

- a. Exact name of each party.
- b. Legal description of property, street address (if any) and assessor's parcel number.
- c. Date of contract.
- d. Recording information, if any.

B.1. Securities Accounts (Securities held by broker or in dividend reinvestment accounts. List IRA's under E.3.)

- a. Name & address of stockbroker or mutual fund.
- b. Account number.
- c. Exact name(s) on account.

B.2. Securities (Stocks & Bonds for which the decedent has the actual certificates. List closely-held stock under E.2)

- a. Exact name of company.
- b. Certificate number(s).
- c. Number of shares for each certificate.
- d. Exact name(s) of owner(s).
- e. Type (stock, bond, mutual funds, etc.)

C.1. Checking, Savings and Other Cash Accounts (List CD's under C.2 and IRA's under E.3. Do not list accounts owned by corporation or other business entity.)

- a. Name & branch address of financial institution.
- b. Account number.
- c. Name of each person authorized to sign checks or withdrawals.
- d. Number of signatures required.
- e. Type of account (checking, savings, etc.)

C.2. Savings Certificates; Bonds & T-Bills

- a. Name & address of issuing institution or agency.
- b. Number of certificate.
- c. Face amount of certificate.
- d. Exact name(s) on certificate.

C.3. Promissory Notes Receivable (Money owed to the decedent, including trust deeds and mortgages.)

- a. Exact name(s) of maker(s).
- b. Exact name(s) of payee(s).
- c. Original amount of note.
- d. Date note was signed.
- e. If secured by mortgage or trust deed, include assessor's parcel number and provide copy of recorded document which shows:
 - (1) legal description, including county and state; and
 - (2) recording information, including date, book, page, and document numbers.

C.4. Judgments; Amounts Receivable (Judgments; court orders; other documented amounts due the decedent. Exclude oral promises and debts owed to businesses.)

- a. Name and address of debtor.
- b. Exact name for the decedent.

- c. Date debt established.
- d. Purpose and type of debt. (Provide copy of judgment, decree, court order, or other documents.)

D.1. Life Insurance Policies (If owned by decedent or payable to estate.)

- a. Name & address of company.
- b. Policy number.
- c. Name of insured, name of owner.
- d. Exact name(s) of primary beneficiary(ies).
- e. Exact name(s) of the contingent beneficiary(ies).
- f. Request IRS Form 712 from insurer.

E.1. Vehicles, Boats, Motor Homes; Mobile Homes, etc.

- a. Manufacturer/trade name.
- b. Year.
- c. Serial number.
- d. Exact name(s) on title.

E.2. Business Interests

- a. Name and location of business.
- b. Type of entity (partnership, corporation, limited-liability company, etc.)
- c. Tax status of entity (S corporation, C corporation, partnership, disregarded entity, etc.)
- d. Description of decedent's interest (shares, percentage ownership, etc.), including certificate numbers (for stock) or agreement dates (for partnership and limited-liability company interests).
- e. Explain any restrictions on transfers of owners' interests under buy-sell agreements, liens, loan covenants, etc.
- f. Information regarding special regulations or licensing (e.g., gaming license, liquor license, professional license, etc.).

E.3. IRA & KEOGH Accounts; Other Employee Death/Retirement Benefits

- a. Name & address of employer, lodge, union, bank, broker, etc.
- b. Employee or membership number.
- c. Exact name of employee.
- d. Nature and extent of benefits.
- e. Exact name(s) of primary beneficiary(ies).
- f. Exact name(s) of the contingent beneficiary(ies).

E.4. Safe-deposit Boxes

- a. Name & address of bank or vault company.
- b. Box number.
- c. Signatories.

E.5. Other Rights & Interests (Furnish full information.)

- a. Contracts, such as club memberships, contractual timeshare interests, royalties, etc.
- b. Intellectual property (e.g., copyrights, patents, trademarks, etc.)
- c. Benefits and rights under existing trusts, including powers of appointment.
- d. Aircraft, including commercial-use drones.
- e. Collections (antiques, antiquities, art, autographs, coins and currency, comic books, documents, figurines, gems, guns, jewelry, photos, precious metal, sports memorabilia, stamps, trading cards, etc.)
- f. Digital property and other digital rights (including online financial and social media accounts) of the decedent.
- g. Other assets not mentioned.