



EvansCase, LLP
1660 S. Albion Street, Suite 1100
Denver, Colorado 80222-4047

(303) 757-8300 / Fax: (303)
753-0444 www.evanscase.com

JOHN CASE | AARON L. EVANS | LARRY S. JACOBS♦ | JOSEPH P. STENGEL, JR♦♦
EILEEN S. KOTTENSTETTE | KARI JONES | TIM BOUNDS

♦ also admitted in Texas ♦♦ also admitted in Wyoming

I. CONTACT INFORMATION

Client's Name: _____ Date: _____

Birth Date: _____

Social Security Number: _____
(This is needed to get the federal tax ID number for the Estate)

Mailing Address: _____
Street City State Zip

Email Address: _____

Day Phone Number: _____ Cell Number: _____

Who will be responsible for paying the legal expenses? _____

Please answer the appropriate questions as accurately as possible in section II or III based on the services you are requesting from me. This information is necessary to provide my best service to you. All information provided is strictly confidential. Thank you.

II. YOUR ESTATE MATTER

We will need at least a copy of the Death Certificate as soon as it's possible.

Name of Decedent: _____ Date of Death: _____

Identify all names used by the Decedent, for example John A. Smith, John Andrew Smith, Johnny Smith

Age at the time of death _____ Social Security Number: _____

County where Decedent died or had property: _____

Did the Decedent have a will and/or codicil(s)? Yes No If **Yes**, bring the original of the will/codicil(s) if you have it, if not already lodge with the Court. If you don't an original please bring a copy(s).

Date of will: _____ Date of codicil(s): _____

Name of Personal Representative identified in will and/or codicil(s): _____

Estimated value of estate: _____

Known assets:

Marital status at time of death _____ or name of deceased spouse and date of death: _____

Identify all heirs/family living on the date of death of the Decedent (including surviving parents). Please provide current mailing address and relationship to Decedent. If a minor under 18, please identify age.

1. _____

2. _____

3. _____

(Attach more sheets if necessary)

ADDITIONAL INFORMATION REQUESTED

Please obtain the documents identified below as they will help us prepare the necessary pleadings to process your matter with the Court. If you have questions, do not hesitate to contact us.

1. Bank statements - last three months.
2. Copies of any outstanding bills, credit card statements, loan statements, etc.

If applicable:

3. Copies of the will/codicil(s) and the original(s), unless already filed/lodged with the Court.
4. Original death certificate, if applicable.
5. Military records, if applicable.
6. Divorce and/or custody agreements.

If you have any of the following assets, you will need to bring in copies of supporting documentation. Examples of supporting documentation are identified below.

- | | |
|------------------------|---|
| 1. Real Estate: | Deeds, property tax statements, appraisals, title policies for all property |
| 2. Retirement: | Recent statements for pension funds, 401(k) accounts, etc. |
| 3. Stocks and Bonds: | Statements and/or original stocks and bonds. |
| 4. Motor vehicles: | Title documents for autos, boats, etc. |
| 5. Insurance: | All policy statements for life, health, home, auto, etc. |
| 6. Business interests: | Legal agreements, financial statements, stock options, etc. |