

## Estate Information Form

DECEASED'S last name: \_\_\_\_\_

DECEASED'S first name: \_\_\_\_\_

PCA Reference Number, if available (do not give SS# or credit card number): \_\_\_\_\_

YOUR last name: \_\_\_\_\_

YOUR first name: \_\_\_\_\_

Relationship to deceased: \_\_\_\_\_

YOUR phone number should we need to contact you: \_\_\_\_\_

Was an Estate opened regarding the deceased? \_\_\_\_\_ Yes \_\_\_\_\_ No

If yes, are you the EXECUTOR of the estate? \_\_\_\_\_

If not you, then please provide the EXECUTOR'S last name: \_\_\_\_\_

EXECUTOR'S first name: \_\_\_\_\_

EXECUTOR'S phone number: \_\_\_\_\_

Address of the EXECUTOR: \_\_\_\_\_  
(provide complete address including city, state and zip)

Last name of the ATTORNEY handling the probate process: \_\_\_\_\_

ATTORNEY'S first name: \_\_\_\_\_

ATTORNEY'S phone number: \_\_\_\_\_

Address of the ATTORNEY: \_\_\_\_\_  
(provide complete address including city, state and zip)

Date estate opened: \_\_\_\_\_

Docket Number (may also be called "estate number"): \_\_\_\_\_

If there was an estate, is the Estate closed? \_\_\_\_\_

If yes, when was the Estate closed? \_\_\_\_\_

If no, will an Estate be opened in the future? \_\_\_\_\_ Yes \_\_\_\_\_ No

**Please fax completed form back to Phillips & Cohen Associates, Ltd. at 302-368-0970**



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