ZACHARIA BROWN & BRATKOVICH, PC
Estate Planning & Elder Law Attorneys
McMurray | Delmont | Cranberry Twp, PA
724-942-6200 | ZacBrownLaw.com

ESTATE & TRUST ADMINISTRATION — CLIENT INTAKE

Please complete this form and return it to our office before your appointment.
Do your best — estimates are fine. We will review everything together at your appointment.

TYPE OF MATTER (Check all that apply)

☐ Estate Administration — Probate (with or without a Will)	☐ Trust Administration
☐ Estate Administration — Non-Probate (assets pass outside of court)	☐ Out-of-State Property Administration

PA County of Administration:		**Register of Wills File #:**	

ABOUT THE PERSON WHO PASSED AWAY (Decedent)

Full Legal Name	

Date of Birth	Date of Death	Age at Death	Last 4 of SSN	County of Residence

Last Address			
Marital Status at Death		**Surviving Spouse Name**	

LEGAL DOCUMENTS

Last Will & Testament — Date:	
Codicil(s) to Will — Date(s):	
Revocable Living Trust — Date:	
Irrevocable Trust — Date:	
Other Governing Document:	

Where are original documents kept?	

PERSON IN CHARGE (Executor / Trustee / Administrator)

Executor / Personal Representative			Ph.	
Successor Executor			Ph.	
Trustee			Ph.	
Successor Trustee			Ph.	
Administrator (no Will)			Ph.	

Address:			
Email:		**Relationship to Decedent:**	

ADDITIONAL CONTACT (if different)

Name		**Relationship**		**Phone**	
Email					

FINANCIAL ADVISOR & ACCOUNTANT / CPA

Financial Advisor			Firm		Ph.	
CPA / Accountant			Firm		Ph.	

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SURVIVING FAMILY MEMBERS

Name	Relationship	Date of Birth	Address	Phone / Email

BENEFICIARIES / WHO INHERITS

Full Name	Relationship	Share / Bequest	Address	Disability / SNT?	Pre-deceased?
				☐ Yes ☐ No	☐ Yes
				☐ Yes ☐ No	☐ Yes
				☐ Yes ☐ No	☐ Yes
				☐ Yes ☐ No	☐ Yes
				☐ Yes ☐ No	☐ Yes
				☐ Yes ☐ No	☐ Yes
				☐ Yes ☐ No	☐ Yes
				☐ Yes ☐ No	☐ Yes
				☐ Yes ☐ No	☐ Yes
				☐ Yes ☐ No	☐ Yes

Did the person pass away WITHOUT a Will? ☐ Yes ☐ No

If yes, Pennsylvania law determines who inherits — our attorneys will explain what that means for your family.

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List everything owned. Estimates are fine. Attach extra sheets if needed.

REAL ESTATE

Property Address / Description	Owner(s) on Deed	How Titled (Joint/Sole/TOD)	Est. Value	Mortgage / Lien	In Trust?
					☐ Y ☐ N
					☐ Y ☐ N
					☐ Y ☐ N
					☐ Y ☐ N
					☐ Y ☐ N

BANK ACCOUNTS

Institution	Account Type	Account # (Last 4)	Owner(s)	Beneficiary / POD	Est. Value

INVESTMENTS & RETIREMENT ACCOUNTS

Institution / Company	Account Type (IRA, 401k, etc.)	Account # (Last 4)	Owner	Beneficiary	Est. Value

LIFE INSURANCE

Insurance Company	Policy #	Policy Owner	Insured	Beneficiary	Death Benefit

VEHICLES & PERSONAL PROPERTY

Description / Make & Model	Year	Title Owner	Est. Value	Lien?	Jointly Held?

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DEBTS & BILLS

Creditor / Description	Debt Type	Account #	Balance Owed	Secured?
				☐
				☐
				☐
				☐
				☐
				☐
				☐

FUNERAL & BURIAL EXPENSES

Funeral Home / Cemetery	Pre-Paid?	Amount Paid / Owed	Paid By	Receipt?
	☐ Y ☐ N			☐ Y ☐ N
	☐ Y ☐ N			☐ Y ☐ N

PENNSYLVANIA INHERITANCE TAX

Pennsylvania Inheritance Tax Rates — Reference Only (your attorney will calculate the exact amount)

- Surviving Spouse / Charitable Organizations: 0%
- Lineal Heirs (children, grandchildren, parents): 4.5%
- Siblings: 12%
- All Other Beneficiaries: 15%
- Transfers to certain family farms / small businesses: 0% (if qualified)

Answer as best you can — your attorney will review everything with you.

Were gifts of money or property made within 1 year of death?	☐ Yes ☐ No
Were assets transferred when the person knew they were seriously ill?	☐ Yes ☐ No
Did the person own any property jointly with another person?	☐ Yes ☐ No
Were any assets placed into an irrevocable trust?	☐ Yes ☐ No
Has a PA Inheritance Tax return already been filed?	☐ Yes ☐ No

BUSINESS INTERESTS

Business Name	Entity Type (LLC, Corp, etc.)	Ownership %	Est. Value	Buy-Sell Agreement?	Other Owner(s)
				☐ Y ☐ N	
				☐ Y ☐ N	
				☐ Y ☐ N	

ESTATE & TRUST ADMINISTRATION — CLIENT INTAKE

DOCUMENTS — Check all that apply

- ☐ Original Will / Codicil(s)
- ☐ Original Trust Agreement
- ☐ Death Certificate (certified)
- ☐ Deed(s) to Real Property
- ☐ Recent Bank / Investment Statements
- ☐ Life Insurance Policies
- ☐ Vehicle Titles
- ☐ Prior Tax Returns (Federal & PA)
- ☐ Funeral / Burial Receipt
- ☐ Business / Operating Agreements
- ☐ Retirement Account Statements
- ☐ Annuity Contracts
- ☐ Prior PA Inheritance Tax Return
- ☐ Pre-Nuptial / Post-Nuptial Agreement
- ☐ Promissory Notes / Loans Owed to Decedent

STATUS CHECKLIST — Yes or No

Has the estate been filed at the Register of Wills?	☐ Yes	☐ No
Have Letters Testamentary or Letters of Administration been issued?	☐ Yes	☐ No
Has a Notice to Creditors been published in a newspaper?	☐ Yes	☐ No
Has a PA Inheritance Tax return been filed?	☐ Yes	☐ No
Has a Federal Estate Tax return (Form 706) been filed?	☐ Yes	☐ No
Have the final income tax returns been filed?	☐ Yes	☐ No
Are there any pending lawsuits or claims against the estate?	☐ Yes	☐ No
Are there any assets located outside of Pennsylvania?	☐ Yes	☐ No
Was the person receiving Medicaid at the time of death?	☐ Yes	☐ No
Have any assets already been distributed to beneficiaries?	☐ Yes	☐ No

YOUR QUESTIONS & CONCERNS

HOW DID YOU HEAR ABOUT US?

- ☐ KDKA Radio
- ☐ IN Magazine
- ☐ Friend
- ☐ Family
- ☐ Financial Advisor
- ☐ Seminar or Webinar
- ☐ Web Search
- ☐ Other:

Referred by (Name):

Signature of Executor / Trustee / Contact _____ Printed Name _____ Date _____