

McAndrews Law Offices, P.C.



30 Cassatt Avenue  
Berwyn, Pennsylvania 19312  
Phone: 610 648 9300  
Fax: 610 648 0433  
www.mcandrewslaw.com

ATTORNEYS AT LAW

**ESTATE ADMINISTRATION QUESTIONNAIRE**

Name of Decedent: \_\_\_\_\_

Social Security Number of Decedent: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_

Date of Death: \_\_\_\_/\_\_\_\_/\_\_\_\_

Age at Death: \_\_\_\_/\_\_\_\_/\_\_\_\_

Place of Death: \_\_\_\_\_

Principal residence of Decedent: \_\_\_\_\_

Marital Status of Decedent at Death: \_\_\_\_\_

Offspring of Decedent and their ages at present:

\_\_\_\_\_  
\_\_\_\_\_

Copy of Will and any Codicils Available? \_\_\_\_\_

Death Certificate Available? \_\_\_\_\_

Location of any safe deposit box: \_\_\_\_\_

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List of all personal property (e.g., bank accounts, CDs, mutual funds, stocks, bonds, etc.), location of each asset, estimated values, and how the assets are titled (individually, jointly, etc.)


List of all real estate owned in Pennsylvania, estimated values, and how the real estate is titled (individually, jointly, etc.)


Please provide a list with account numbers of any significant debts or other financial liabilities (e.g. mortgages, loans, etc.) of Decedent


**Copies of income tax returns for last two to three years – Attach copies -**

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Name, address, telephone number, e-mail address and SSN of Executor(s) or Administrator(s):


Name(s), address(es), and SSN(s) of all beneficiaries:


Did Decedent have any life insurance policies? If so, please provide the life insurance company(ies), policy number(s), and beneficiary(ies):


Did Decedent have any pension/retirement plan? If so, please provide the name of the administrator of the plan and a copy of a recent statement (if available):

- Please attach -

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Did Decedent have any IRAs? If so, please provide the location of each IRA, account number(s), and the name(s) and address(es) of the beneficiary(ies)


If Decedent left no Will, list the names, addresses, telephone numbers and relationship of spouse, children and all heirs:


Who referred you to McAndrews Law Offices, P.C.?
