



**James C. Morris, Jr., Esq.**

Attorney at Law · Certified Public Accountant · Certified Specialist in Estate Planning  
Legal · Financial · Tax · Business Services · Estate Planning

---

**ESTATE ADMINISTRATION FORM**

**Name of deceased** \_\_\_\_\_

**Address of deceased** \_\_\_\_\_

**City** \_\_\_\_\_ **State** \_\_\_\_\_ **Zip Code** \_\_\_\_\_

**County** \_\_\_\_\_

**Date of Death** \_\_\_\_\_ **Today's Date** \_\_\_\_\_

**Spouse's name** \_\_\_\_\_

**Executor/Administrator Name** \_\_\_\_\_

**Address** \_\_\_\_\_

**City** \_\_\_\_\_ **State** \_\_\_\_\_ **Zip Code** \_\_\_\_\_

**Phone** \_\_\_\_\_

**Relation to decedent** \_\_\_\_\_

**E-mail Address** \_\_\_\_\_

**Co-Executor/Co-Administrator Name** \_\_\_\_\_

**Address** \_\_\_\_\_

**City** \_\_\_\_\_ **State** \_\_\_\_\_ **Zip Code** \_\_\_\_\_

**Phone** \_\_\_\_\_

**Relation to decedent** \_\_\_\_\_

**E-mail Address** \_\_\_\_\_



**Checklist of deceased's assets and liabilities:** Please be sure to include all account numbers where applicable

**Cash and Notes**

	<b>Account numbers</b>	<b>Amount</b>	<b>%</b>	<b>706 Sch</b>
Checking accounts		\$		
Savings accounts		\$		
Certificates of deposit		\$		
Credit union accounts		\$		
Uncashed checks		\$		
Notes held by decedent		\$		
Debts due decedent		\$		
Cash and valuables on decedent at death		\$		

**Real Estate**

	<b>Account numbers</b>	<b>Amount</b>	<b>%</b>	<b>706 Sch</b>
Residence		\$		
Other real estate		\$		
Cemetery lots		\$		
Remainderman interest in estate		\$		
Mortgages held by decedent		\$		
Contracts to buy or sell by decedent		\$		
Leases		\$		

Limited partnership interest in real estate		\$		
---	--	----	--	--

**Stock and Bonds**

	<b>Account numbers</b>	<b>Amount</b>	<b>%</b>	<b>706 Sch</b>
Stocks		\$		
Bonds		\$		
Mutual funds		\$		
Government savings bonds		\$		

**Personal Property**

**Please include Vehicle Identification Numbers (VIN) where applicable**

	<b>Description</b>	<b>Current value</b>	<b>%</b>	<b>706 Sch</b>
	Cars, trucks, boats, motorcycles	\$		
	Cars, trucks, boats, motorcycles	\$		
	Cars, trucks, boats, motorcycles	\$		
	Cars, trucks, boats, motorcycles	\$		
	Cars, trucks, boats, motorcycles	\$		
	Household furnishing and contents	\$		
	Personal property held by others	\$		
	Silver and gold	\$		
	Jewelry	\$		
	Hobby assets (coins, gems, stamps)	\$		
	Safe deposit box	\$		

Please indicate name of source

	<b>Source</b>	<b>Beneficiary designated</b>	<b>Amount</b>	<b>%</b>	<b>706 Sch</b>
Wages			\$		
Vacation pay			\$		
Profit sharing			\$		
Pension plan			\$		
Savings plan			\$		
Benefits from previous employers			\$		
Qualified Retirement Plans			\$		
IRA			\$		
401(k)/403(b)			\$		
Annuities			\$		
Roth			\$		
Life Insurance			\$		
Life Insurance			\$		
Life Insurance			\$		

**Miscellaneous**

	<b>Description</b>	<b>Amount</b>	<b>%</b>	<b>706 Sch</b>
Business assets		\$		
Custodial accounts		\$		
Frequent flyer miles (transferable to heirs, value not applicable)				
Pets and livestock		\$		
Tax refunds		\$		
Past due alimony or child support		\$		
Transfers in contemplation of death		\$		
529 Plans		\$		
Education savings accounts		\$		
		\$		
		\$		

The probable value of real and personal property of the decedent's estate is approximately

\$ \_\_\_\_\_

Any military service by decedent or spouse? \_\_\_\_\_

Are there any other proceedings relating to this estate pending? If yes, please name the county, state, name of court, matter in which this estate relates to the proceedings, and file/case/docket number \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## LIABILITIES

**For charge accounts, we will need to know the name and address of each creditor**

	Name(s) and address(es)	Account number(s) (if applicable)	%	706 Sch
Charge accounts				
House mortgage				
Notes				
Other mortgages				
Utilities				
Funeral bills				
Taxes				
Past due alimony				
Child support				
Debts due as fiduciary				
Hospital				
Doctor				
Grave marker				
Pledges to charity				
Leases or rent				
Judgments				
Sales contracts				
Nursing Home Medicaid				
Other				