

Name: _____

Address: _____

Phone: _____

Email: _____

Name of deceased:

Address: _____

Date of Death: _____

Place of Death: _____

Did he/she have a will? _____

Will has to be filed with court in 30 days of death, even if a probate estate is not opened.

Do you have death certificate? _____

Was he/she married at time of death? _____
If yes, name of spouse: _____

How many times married: _____

Name of Spouse	Date ended by Death/ Divorce
1. _____	_____
2. _____	_____
3. _____	_____

Children: Deceased? Minor? Disabled?

Marriage 1: _____, _____, _____

Marriage 2: _____, _____, _____

Marriage 3: _____, _____, _____

For any deceased child, list his or her children and whether alive minor or disabled.

Children of Deceased Child 1:
_____, _____, _____

Children of Deceased Child 2:
_____, _____, _____

IS PROBATE NEEDED?

Probate involves assets belonging to the deceased after death.

1. Most joint assets become the property of the joint tenant upon death.

2. Insurance policies are payable to the beneficiaries and not part of the estate.

3. 401(k), IRA, Pension Plan often have named beneficiaries.

PROBATE REQUIRED

In Illinois real estate in the sole name of the deceased must be probated. There are complicated exceptions.

If there is no real estate and estate assets are less than \$100,000.00, a small estate affidavit can be used to avoid probate.

If car titles are involved, the Secretary of State has a form that you can use.

CLAIMS

Claims against the estate have a pecking order:

1st: Funeral and burial expenses, expenses of administration, statutory custodial claims.

2nd: The surviving spouse's or child's award.

3rd: Debts due the United States.

4th: Reasonable and necessary medical, hospital, and nursing home expenses for the care of the decedent during the year immediately preceding death; and money due employees of the decedent of not more than \$800 for each claimant for services rendered within 4 months prior to the decedent's death.

5th: Money and property received or held in trust by decedent which cannot be identified or traced.

6th: Debts due this State and any county, township, city, town, village or school district located within this State.

7th: All other claims.