

HUNTERDON COUNTY SURROGATE'S COURT

Hunterdon County Justice Center, 65 Park Avenue, P.O. Box 2900, Flemington, NJ 08822

Tel. (908) 788-1156 - Fax 788-1586 - email: surrogate@co.hunterdon.nj.us

PROBATE INFORMATION SHEET

DECEDENT INFORMATION

Name of Deceased (on will): _____ Age _____

Alternate Names on Death Cert, Accounts or License: _____

Address Where Deceased Was *Residing* at the Time of Death:

Street # and Street City Zip

Township, Borough or City the residence was located in (where taxes were paid to)

Date of Death: _____ Date of Will: _____ Date of Codicil*: _____

**legal change or addition to will*

NUMBER OF PROBATE CERTIFICATES NEEDED: _____ (If unsure, review page 3)

EXECUTOR INFORMATION *(List your name(s) as stated in will and as stated on your driver's license)*

Executor: _____ Executor SSN: _____

Executor Address: _____

Relationship to Decedent: _____

Executor Phone Number: _____ Email: _____

Co-Executor _____ Co-Executor SSN: _____
(Only If Qualifying)

Co-Executor Address: _____

Co-Exec Phone Number: _____ Email: _____

Co-Exec Relationship to Decedent: _____

Federal I.D. Number (only needed if *Bank* is Executor): _____

Attorney (if applicable): *(not the attorney who wrote the will; ONLY list an attorney if you are using one now)*

NAME: _____ PHONE NUMBER: _____

ADDRESS: _____ EMAIL:

If the Will is not self-proven, list the name of the witness to prove the will:

(if you do not know what this means, please skip this portion)

Other Witnesses: _____

SURVIVORS AND NEXT OF KIN

- Closest Next of Kin must be listed *regardless* of whether they are beneficiaries or not, estranged, etc.
- If the next of kin's name is different in the will than their current legal name, please note that
- List the relationship to the decedent (mother/father/brother, etc.)
- You must find out each address; you cannot leave it “unknown”
- Please include zip codes

Name (in will AND current if different)	Relationship	#/Street/City/ZIP	Age (if a minor)
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Were any children listed above born after the will was written?

Did the Decedent have any deceased children? If so:

Deceased Child's Name

Their Children's Names, with Full Addresses

IF QUALIFYING AS TRUSTEE WITHIN THE WILL COMPLETE THE FOLLOWING:

Name of Trust: _____

Article or Paragraph Trust is listed: _____

Trustee (only if qualifying): _____

Full Address: _____

Beneficiary of Trust (name and full address):

HOW MANY CERTIFICATES DO I NEED?

When someone dies, their assets are typically frozen and access to these assets are blocked. (One exception to this is joint spousal accounts, wherein the asset defaults to the surviving spouse.)

A executor will need probate certificates (of called “short certificates”), which are different than death certificates, to prove to an institution (bank, DMV, etc.) that they have the authority to access a decedent’s assets.

An executor should not need to present a probate certificate for *debts*.

*Joint Spousal assets usually do not require a certificate; they typically default to the surviving spouse.

ASSET	DO I NEED A CERTIFICATE?*
Real Estate	Yes; 1 per property
Titled Vehicles Cars/Trucks/Trailers/Boats/Planes, etc.	Yes; 1 per title
Bank Accounts Checking/Savings/CDs	Yes; 1 per bank (not account)
Investments/Stocks/Bonds	Yes; 1 per financial institution (not account)
Retirement Accounts/Pensions	<i>Only</i> if there is no beneficiary listed
Life Insurance Policies	<i>Only</i> if there is no beneficiary listed
Safe Deposit Box	Yes <i>if</i> you are not named as co-owner of the box
Personal Property	No

One certificate is included in your *probate fee*; additional certificates are \$5 each.

Don’t go overboard with extra certificates “just in case” because they can expire in time based on the rules of the asset-holder you are dealing with. You can always request additional certificates from the Surrogate’s Court as needed.