

File #

**PART 1: GENERAL INFORMATION QUESTIONNAIRE**

A. Decedent's Name	B. Social Security Number	C. Date of Death
D. Decedent's Residence at Death	E. State	F. County
G. Marital Status at Death Married <input type="checkbox"/> Name of Surviving Spouse _____ Single, Widow(er) or Divorced <input type="checkbox"/>		
H. Fiduciary's Name and Mailing Address (include zip code)	I. Preparer's Name and Address CPA <input type="checkbox"/> Attorney <input type="checkbox"/>	
_____	_____	
_____	_____	
_____	_____	
Fiduciary's Phone Number:	Preparer's Phone Number:	

**PART 2: QUESTIONNAIRE OF NONPROBATE PERSONAL PROPERTY**

Answer each of the following questions concerning the decedent's interest in NONPROBATE PERSONAL PROPERTY. Nonprobate personal property means all property which does not pass by operation of the decedent's will or by the laws of intestate descent and distribution or is otherwise not subject to administration in a decedent's estate.

Note: All real estate and probate property are to be reported on the Appraisal of the Estate (ET 6.01) filed with the County Commission.

If you answer "YES" to any question below, you must complete PART 3 of this form which shows:

- a. the type of transfer(s) with reference to the question number below;
- b. name(s) of the person(s) with an interest in the property as joint tenant or transferee;
- c. relationship to the decedent of ALL above named persons;
- d. market value at the death; and
- e. description of the property.

	MARKET VALUE
1. Did the decedent possess any powers of appointment?.....YES <input type="checkbox"/> NO <input type="checkbox"/>	1
2. Did the decedent make any gifts or transfers without adequate consideration within three years prior to the date of death?.....YES <input type="checkbox"/> NO <input type="checkbox"/>	2
3. Did the decedent make any transfers in Trust which passed to others upon his death?.....YES <input type="checkbox"/> NO <input type="checkbox"/>	3
4. Did the decedent own any stock, bonds, bank accounts, certificates of deposit or other personal property as a joint tenant with the right of survivorship?.....YES <input type="checkbox"/> NO <input type="checkbox"/>	4
5. Did the decedent own any life insurance policies to named beneficiaries?.....YES <input type="checkbox"/> NO <input type="checkbox"/>	5
6. Did the decedent own any annuities?.....YES <input type="checkbox"/> NO <input type="checkbox"/>	6
7. Did the decedent own an interest in any personal property as a life tenant?.....YES <input type="checkbox"/> NO <input type="checkbox"/>	7
8. Did the decedent own any personal property which was payable on death to others?.....YES <input type="checkbox"/> NO <input type="checkbox"/>	8
9. Did the decedent file any Federal Gift Tax Returns with the IRS or make any taxable gifts under Federal Gift Tax law or regulations?.....YES <input type="checkbox"/> NO <input type="checkbox"/>	9
10. Did the decedent own any other nonprobate personal property includible in the federal gross estate of a decedent?.....YES <input type="checkbox"/> NO <input type="checkbox"/>	10
11. TOTAL VALUE OF NONPROBATE PERSONAL PROPERTY (add lines 1 through 10 above).....	11

**PART 3: INVENTORY OF NONPROBATE PERSONAL PROPERTY (attach additional sheets if needed)**

- a. the type of transfer(s) with reference to the question number in PART 2;
- b. name(s) of the person(s) with an interest in the property as joint tenant or transferee;
- c. relationship to the decedent of ALL above named persons;
- d. market value at the date of death; and
- e. description of the property.

Question No.	DESCRIPTION OF PROPERTY AND TRANSFER	MARKET VALUE
<b>TOTAL VALUE OF NONPROBATE PERSONAL PROPERTY</b> (this total must equal total of line 11 on PART 2)		

**PART 4: OATH OF FIDUCIARY**

State of \_\_\_\_\_

County of \_\_\_\_\_, To-wit:

I, \_\_\_\_\_, fiduciary for the estate of \_\_\_\_\_, after diligent effort to ascertain the taxable property of this estate, have made answers to each of the questions and have completed, in detail, the list for each category of property and believe each item thereof to be correct. I thereby believe the foregoing to be the true and lawful inventory of ALL nonprobate personal property of the estate of the above named decedent.

\_\_\_\_\_  
Fiduciary

Subscribed and sworn to before me this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_

\_\_\_\_\_  
Notary Public

My Commission expires \_\_\_\_\_, 20\_\_\_\_