ESTATE OR TRUST ADMINISTRATION INFORMATION PACKET

ELDER LAW PRACTICE OF MONICA FRANKLIN, LLC

Your appointment with us is: ________________________________ in our ________Knoxville office at 4931 Homberg Drive, Knoxville, Tennessee 37919. Directions to our office are enclosed or available on our website.

These questions pertain to the person ("you") for whom we are planning. We ask a lot of questions on this form because we need a lot of information for Estate Administration. Please call us at (865) 588-3700 if you have any questions or concerns about completing this form.

Date:______________________________ Referred by:____________________________________

____

1. Personal Information related to the decedent and you.

Your name:	______________________	**Decedent's Full Name:**	______________________
Address:	______________________	Date of	______________________
	______________________	Date of	______________________
Phone:	______________________	Address:	______________________
Email:	______________________	Relationship to you:	______________________
County:	______________________	SSN:	______________________
Date of birth:	______________________		
Cell phone:	______________________		
SSN:	______________________		

Did the decedent have(check one):

_____ a Will, or

_____ a Trust, or

_____ both

2. Relatives of Decedent: Please list the Decedent's spouse, children (if an adult child is deceased, list that child and date of death. List that child's children if the deceased child left children. Also, if the Decedent has living parents and/or siblings, please list them below.

Name: ______________________ Name: ______________________

Relationship to Decedent: ______________________ Relationship to Decedent: ______________________

Address: ______________________ Address: ______________________

Phone: ______________________ Phone: ______________________

Email: ______________________ Email: ______________________

Date of Birth: ______________________ Date of Birth: ______________________

Date of Death: ______________________ Date of Death ______________________

Name: ______________________ Name: ______________________

Relationship to Decedent: ______________________ Relationship to Decedent: ______________________

Address: ______________________ Address: ______________________

Phone: ______________________ Phone: ______________________

Email: ______________________ Email: ______________________

Date of Birth: ______________________ Date of Birth: ______________________

Date of Death: ______________________ Date of Death ______________________

Name: ______________________ Name: ______________________

Relationship to Decedent: ______________________ Relationship to Decedent: ______________________

Address: ______________________ Address: ______________________

Phone: ______________________ Phone: ______________________

Email: ______________________ Email: ______________________

Date of Birth: ______________________ Date of Birth: ______________________

Date of Death: ______________________ Date of Death ______________________

PLEASE ATTACH ADDITIONAL SHEETS AS NECESSARY FOR RELATIVES' INFO.

DID the Decedent have any dependents (that is, someone who depended on him/her, in whole or in part, for their support)? ☐ Yes ☐ No
If yes, who?:____

Are any of the Decedent's children receiving Supplement Security Income, Social Security Disability; or, if not, has any major disabilities? ☐ Yes ☐ No
If yes, who?:____

3. Resources

A. Personal Residence—Please bring a copy of the Warranty Deed

Address of property:____

Names as they appear on deed: ____

Date Acquired: ___________________________ Purchase Price: ________________

Current Value: ___________________________ Tax-Appraised Value: ___________

Mortgage Company (include address and phone number, or a recent account statement):

____

Mortgage Balance: __________________________

B. Other Real Estate—Please bring a copy of the Warranty Deed(s)

Address of property:____

Names as they appear on deed: ____

Date Acquired: ___________________________ Purchase Price: ________________

Current Value: ___________________________ Tax-Appraised Value: ___________

Mortgage Company (include address and phone number, or a recent account statement):

____

Mortgage Balance: __________________________

Address of property:____

Names as they appear on deed: ____

Date Acquired: ___________________________ Purchase Price: ________________

Current Value: ___________________________ Tax-Appraised Value: ___________

Mortgage Company (include address and phone number, or a recent account statement):

____

Mortgage Balance: __________________________

C. Other Assets—Please attach recent account statements

These are your bank accounts, CDs, annuities, stocks, retirement plans, and the like.

Type of Asset: ____

Name of Company: ____

Value: ____

How is it titled?: ____

Type of Asset: ____
Name of Company: ____
Value: ________________________________
How is it titled?: ____

Type of Asset: ____
Name of Company: ____
Value: ________________________________
How is it titled?: ____

Type of Asset: ____
Name of Company: ____
Value: ________________________________
How is it titled?: ____

Type of Asset: ____
Name of Company: ____
Value: ________________________________
How is it titled?: ____

Type of Asset: ____
Name of Company: ____
Value: ________________________________
How is it titled?: ____

Total Value of Assets on this Page: ____________________

Did the Decedent have a safe deposit box? ☐ Yes ☐ No

If yes, list name of bank, branch and box number.

____

D. List all life insurance. Please bring policies with you.

Company Name: ____
Owner: ____
Insured: ____
Beneficiary: ____
Death Benefit (face value): ____
Cash surrender value: ____
Loan against policy (if any): ____

Company Name: ____________________
Owner: ____________________
Insured: ____________________
Beneficiary: ____________________
Death Benefit (face value): ____________________
Cash surrender value: ____________________
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Company Name: ____________________
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Insured: ____________________
Beneficiary: ____________________
Death Benefit (face value): ____________________
Cash surrender value: ____________________
Loan against policy (if any): ____________________

E. List large items of personal property Decedent owned (cars, boats, RVs, farm equipment, etc.):

Personal Property (Item)	Value

Have the funeral and burial expenses been paid? ☐ Yes ☐ No

If no, list the funeral home with the address and contact person:____________________

____

4. Money Decedent Owed—Please bring recent account statements showing debt owed.

(Please attach a separate sheet if more space is needed.)

Creditor's Name	Amount Owed
Total	

5. Gifts and Transfers

Has the Decedent made any gifts or transfers, greater than $500.00, to any individuals or to a trust within the last 60 months? ☐ Yes ☐ No

If yes, please furnish the indicated information for each gift or transfer:

To whom: ____________________	To whom: ____________________
Date of gift: ____________________	Date of gift: ____________________
Item: ____________________	Item: ____________________
Value: ____________________	Value: ____________________
To whom: ____________________	To whom: ____________________
Date of gift: ____________________	Date of gift: ____________________
Item: ____________________	Item: ____________________
Value: ____________________	Value: ____________________

6. Please bring the death certificate with you to your appointment.

Ten Things to Do When Someone Dies

1. Pronouncement of Death: You need an official Pronouncement of Death to obtain a Death Certificate. This can be made by a doctor, coroner, or a police officer (if the death occurs at home). If the death occurs at home and you call 911 for paramedics, they will attempt resuscitation before pronouncing death.

2. Notify Family and Friends: The first business to take care of is to notify family and friends. It can be helpful to allow other family members or friends to help with the notification process.

3. Notify Us: Please let us know so that we can assist you in any way possible.

4. Funeral and Burial Arrangements: First, check with us or look through the deceased's papers to see if he or she had a prepaid burial plan or wrote any instructions regarding his or her funeral/memorial service. The Durable Power of Attorney for Health Care has a section for this information. Contact a funeral home and/or a religious leader for help with funeral arrangements. We also recommend taking a trusted friend or family member with you to the mortuary to make the arrangements.

5. Obituary: Check to see if the deceased wrote an obituary—it might be located with their Will in their safe deposit box at the bank. If they have not written an obituary, ask other family members and long-time friends for help.

   Note: If your name is also on the Safe Deposit Box, you can enter it at any time. If not, an heir or beneficiary of the Will can ask the bank to search the box for a Will, a deed for a burial plot, and burial instructions. If your name is not on the Safe Deposit Box, and if there are no estate planning documents in the box, the bank will not allow you access.

6. Other details: In the first several days, it helps to allocate the tasks required. Choose people to help answer the phone, collect mail, take care of the lawn, care for pets and find new homes for pets if necessary, and provide food for family and friends after the funeral. We also recommend finding someone to stay at the home of the deceased during the funeral; there have been reports of burglars who scan the obituaries and break into empty homes during funeral services.

7. Death Certificates: Obtain several copies of the Death Certificate; you cannot simply purchase one and make copies—you must order all the copies you need. The number needed depends on how complex the deceased person's estate was and how many agencies will need to be notified of the death. We recommend ordering 10 to start. The funeral director can help obtain the Death Certificates, or you may order certified Death Certificates from the state Vital Records Office. Tennessee's Vital Records' website is http://health.state.tn.us/vr/

8. Notifications of Death: Within the first 10-15 days of death, any institution from which the deceased received paychecks needs to be notified of their death. This includes an employer for pension checks and Social Security. The Social Security Administration is on the look-out for fraud, so it is best to notify them soon and before additional checks are received. Social Security and many pension plans have survivorship benefits for spouses and surviving family members—generally, the surviving spouse is eligible for 100% of the deceased's benefits. When you contact them to notify them of the death, they can help you determine the survivorship benefits.

   After you have rested from the funeral, it is time to begin notifying other people and institutions, such as:

   a. Bank: they will help you locate accounts and the re-title joint accounts or accounts with beneficiary designations;

   b. Post Office: file a request at a local Post Office to redirect mail addressed to a deceased individual. Information about this can be found at http://www.usps.com/receive/deceasedpersonsmail/deceased-persons.htm The Direct Marketing Association (DMA) has also a Deceased Do Not Contact List that removes the deceased's name from all commercial marketing lists. To register a name and learn more, visit https://www.ims-dm.com/cgi/ddnc.php;

   c. Insurance Agents: they will help you obtain the forms to make claims for life insurance, and let them know if the decedent's house is vacant;

   d. Utility Companies: if the deceased's house will now be empty, you can change or stop their services;

   e. Newspaper or magazines: if the deceased subscribed to newspapers or magazines, contact them to discontinue the subscription;

   f. Police: they can check the house of the deceased occasionally if it is empty;

   g. Investment professionals: if the deceased had investments, they can help obtain information on holdings.

9. Make an Appointment With Us and Gather Important Documents: Look for and bring with you to our meeting important documents such as:

   a. Will,
   b. Trusts,
   c. Deeds,
   d. Safety Deposit box rental agreements and keys,
   e. birth certificates,
   f. marriage certificates,
   g. nuptial agreements,
   h. life insurance policies,
   i. tax returns,
   j. gift tax returns,
   k. pensions/retirement benefits,
   l. IRA accounts,
   m. divorce documentation,
   n. computer financial records,
   o. bank statements and checkbooks,
   p. titles or leases to motor vehicles,
   q. documentation of business ownership or interest,
   r. health insurance,
   s. military records and discharge papers,
   t. certificates of deposit,
   u. mortgage policies,
   v. stock and bond certificates, and
   w. unpaid bills.

10. Will and Probate: We will help you make decisions regarding if or when to open probate, how and when to pay creditors, and how to distribute the assets and property in the Will or Trust.