

Successions Questionnaire

Please provide the following information to the best of your ability and return either by email to rbrady@probono-no.org or by mail to:
935 Gravier Street, Suite 1340
New Orleans, LA 70112

Please read each question fully and carefully and let us know if you have any questions. It is important that this document is **completely** filled out. We cannot proceed with your case without the information contained in this questionnaire.

If you have additional information you would like to add, please feel free to include it in an email or separate piece of paper.

Please bring AN ORIGINAL COPY OF THE DECEDENT'S DEATH CERTIFICATE to our office.

CLIENT	
Please print your name below.	
DECEDENT	
<i>The DECEDENT is the person who has died.</i>	
Decedent's name:	
Date of death:	Day: _____ Month: _____ Year: _____
Decedent's last known address:	Street address: _____ City, State: _____ ZIP: _____
Decedent's will:	Did the decedent leave a will? YES (testate) / NO (intestate) Do you have a copy of the will if one exists? YES / NO If YES, please send a copy of the will to our office for review. We will need the ORIGINAL in order to file the succession.
Decedent's marital status at death:	MARRIED DIVORCED SEPARATED WIDOWED NEVER MARRIED
Decedent's spouse:	Does the decedent have a living spouse? YES / NO
Your relationship to the decedent:	

DECEDENT'S SPOUSES

**Decedent's
marriages:**

**Please list ALL
marriages.**

1. Name of Spouse: _____
 Did this marriage end? YES / NO
 If YES, how?
 DIVORCE Date of divorce: _____
 DEATH Date of spouse's death: _____
 If Death, was a succession performed for this spouse? YES / NO
 Were children born of this marriage? YES / NO
 Were children adopted into this marriage? YES / NO

2. Name of Spouse: _____
 Did this marriage end? YES / NO
 If YES, how?
 DIVORCE Date of divorce: _____
 DEATH Date of spouse's death: _____
 If Death, was a succession performed for this spouse? YES / NO
 Were children born of this marriage? YES / NO
 Were children adopted into this marriage? YES / NO

3. Name of Spouse: _____
 Did this marriage end? YES / NO
 If YES, how?
 DIVORCE Date of divorce: _____
 DEATH Date of spouse's death: _____
 If Death, was a succession performed for this spouse? YES / NO
 Were children born of this marriage? YES / NO
 Were children adopted into this marriage? YES / NO

DECEDENT'S CHILDREN

Decedent's children:	<p>Did the decedent have biological or adopted children? YES / NO</p> <p>If YES, please fill out information below. If NO, please move on to the PARENTS and SIBLINGS section on page 3.</p>
<p>Information for decedent's living children:</p> <p>Are any of the decedent's children deceased: YES / NO</p> <p>If yes, please enter the information for the deceased children below</p> <p>If more children, please see the final sheet with additional blanks.</p>	<ol style="list-style-type: none"> 1. Name: _____ Address: _____ Date of birth: _____ 2. Name: _____ Address: _____ Date of birth: _____ 3. Name: _____ Address: _____ Date of birth: _____ 4. Name: _____ Address: _____ Date of birth: _____ 5. Name: _____ Address: _____ Date of birth: _____ 6. Name: _____ Address: _____ Date of birth: _____
<p>Deceased children:</p> <p>If more children, please see the final sheet with additional blanks.</p>	<p>Deceased child's name: _____</p> <p>Was a succession performed for this child? YES/NO</p> <p>Did the deceased child have children? YES / NO</p> <p>If YES please list their name(s) and address(es) below:</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>Deceased child's name: _____</p> <p>Was a succession performed for this child? YES/NO</p> <p>Did the deceased child have children? YES / NO</p> <p>If YES please list their name(s) and address(es) below:</p> <p>_____</p> <p>_____</p> <p>_____</p>

DECEDENT'S PARENTS AND SIBILINGS

Decedent's parents:	<p>Are the decedent's parents living? YES / NO</p> <p>If YES: Please list names and addresses: <u>Mother:</u> Name: _____ Address: _____ <u>Father:</u> Name: _____ Address: _____</p> <p>If NO: Was a succession performed for their mother? YES/NO</p> <p>Was a succession performed for their father? YES/NO</p>
Decedent's siblings:	<p>Are the decedent's siblings living? YES / NO</p> <p>If YES: Please list their names and addresses:</p> <ol style="list-style-type: none"> 1. Name: _____ FULL / HALF sibling of the decedent. Address: _____ 2. Name: _____ FULL / HALF sibling of the decedent. Address: _____ 3. Name: _____ FULL / HALF sibling of the decedent. Address: _____ <p>If NO: Was a succession performed for any siblings? YES/NO Please list any additional information: _____ _____</p>

DECEDENT'S ASSETS

<p>Immovable property:</p> <p>If the decedent owned more than one home, additional space is provided on page 6</p>	<p>Did the decedent own any immovable property such as a house or land? YES / NO</p> <p>If YES, please list the address of the property: Street Address: _____ City, State: _____ ZIP: _____</p> <p>Was the decedent married when they bought the property? YES / NO Did the decedent inherit the property through a succession? YES / NO</p> <p>We will attempt to find the Deed or Act of Sale in Land Records. If we are unable to find it in their online records, we will ask you to request a copy from their office.</p>
<p>Movable property:</p> <p>If more movable property, please see the final sheet with additional blanks.</p>	<p>Did the decedent own any movable property such as a bank account or vehicle? YES / NO</p> <p>If YES: Please fill in the following information:</p> <p><u>BANK ACCOUNT</u> Bank name: _____ Bank address: _____ Bank account number: _____ Amount of money in the account: \$ _____</p> <p><u>VEHICLE</u> Make: _____ Model: _____ Year: _____ Value: \$ _____ VIN number: _____ Color: _____ Mileage: _____ Condition: GOOD FAIR POOR</p> <p>Are there any financial instruments, such as a check, made out to the decedent or to the Estate of Decedent that have not yet been cashed? YES / NO</p>

ADDITIONAL CHILDREN, SIBLINGS, AND PROPERTY

<p>Additional living children:</p>	<p>1. Name: _____ Address: _____ Date of birth: _____</p> <p>2. Name: _____ Address: _____ Date of birth: _____</p>
<p>Additional deceased children:</p>	<p>Deceased child's name: _____ Was a succession performed for this child? YES / NO Did the deceased child have children? YES / NO If YES please list their name(s) and address(es) below:</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>Deceased child's name: _____ Was a succession performed for this child? YES/NO Did the deceased child have children? YES / NO If so please list their name(s) and address(es) below:</p> <p>_____</p> <p>_____</p> <p>_____</p>
<p>Additional siblings:</p>	<p>1. Name: _____ FULL / HALF sibling of the decedent. Address: _____</p> <p>2. Name: _____ FULL / HALF sibling of the decedent. Address: _____</p>

Additional property:	<p style="text-align: center;">Additional immovable property:</p> <p>Please list the address: Street Address: _____ City, State: _____ ZIP: _____</p> <p style="text-align: center;">Additional movable property:</p> <p><u>BANK ACCOUNT</u> Bank name: _____ Bank address: _____ Bank account number: _____ Amount of money in the account: \$ _____</p> <p><u>VEHICLE</u> Make: _____ Model: _____ Year: _____ Value: \$ _____ VIN number: _____ Color: _____ Mileage: _____ Condition: GOOD FAIR POOR</p>
-----------------------------	---

DECEDENT'S DEBTS	
<p>If you answer yes to any of the questions below, a Pro Bono Project staff member may call you for more information. It is important that we have this information, because as an heir you will inherit both the decedent's property as well as their debts.</p>	
Mortgages:	<p>Is there a mortgage on the decedent's immovable property? YES / NO If YES, please complete the following information: Name of the mortgage company: _____</p> <p>Monthly payment: _____</p> <p>Amount left to pay off: _____</p> <p>Is this mortgage in arrears? (Is there an amount that is overdue?) YES / NO</p>
All Other Debts:	<p>Did the decedent have any debt besides a mortgage? YES / NO If YES, please fill out the information below.</p>
Credit cards	<p>Did Decedent have credit card debt? YES / NO</p> <p>Name on account: _____ Name of lender: _____ Account number: _____ Amount overdue: _____</p>

<p>Medical Debts</p>	<p><u>Did the decedent have any unpaid medical bills at the time of their death?</u> YES/NO</p> <p><u>Are any of these medical expenses overdue?</u> YES / NO</p> <p>Amount owed: _____</p> <p>Hospital / Institution: _____</p>
<p>Car Notes</p>	<p><u>Did the decedent have a monthly car payment?</u> YES/NO</p> <p><u>Are any payments overdue?</u> YES/NO</p> <p>Amount owed each month: _____</p> <p>Name of lender: _____</p>
<p>Other Loans & Debts</p>	<p><u>Have the decedent's funeral expenses been paid?</u> YES/NO</p> <p>IF NO, amount owed: _____</p> <p><u>Did the decedent owe any money as the result from a lawsuit?</u> YES/NO</p> <p>IF YES, amount owed: _____</p> <p>If there are any other debts you know of, please include them on a separate piece of paper.</p>
<p>FOR OFFICE USE ONLY</p> <p>Reviewed by:</p> <p>Date:</p>	<p>_____</p> <p>_____</p>

Successions Information Checklist

A succession is the transfer of title to property from the decedent (the person who died) to their heirs. Successions must be executed by an attorney and are necessary to transfer the title to property, regardless of whether the decedent died testate (with a will) or intestate (without a will).

Below is a checklist of the information needed for a succession. Please start gathering the following information and documents as soon as possible. We cannot proceed with your case until we receive the necessary documents and information.

Information

- The decedent's **name, date of death, last known address,** and **marital status** at the time of death.
- Information about **all** of the decedent's spouses: their name(s) and date(s) of marriage.
- The names and address of **all of the decedent's children.** By law, we must notify all heirs to the decedent's estate that a succession is being filed. It is very important that **you** provide us with this information yourself, or we cannot move forward with your case. Please know that this means that we cannot call heirs on your behalf or search for them on the internet.
- The status (alive or deceased) of **all of the decedent's children.**
- If any of the **decedent's children** are **deceased,** list the names and addresses of **the deceased child's children.** Under Louisiana successions law, a grandchild may inherit if their parent is deceased.
- The address and value of the decedent's immovable property (i.e. their house).
- The value of the decedent's movable property (i.e., their car, boat, bank account or investment accounts).
 - For vehicles, you will need to provide the Make, Model, Year and VIN Number.
 - For bank accounts and other financial accounts, you will need to provide the name of the financial institution (i.e. Chase Bank, Regions) and account number.
- Any and all information relating to the debts of the decedent, including but not limited to: mortgages, medical bills, credit card bills, etc.

Documents

- If the decedent died with a will, you will need to send a copy of the will to your attorney.
- An original version of the decedent's death certificate. It is a good idea to get **multiple** originals of the death certificate and keep them in your records, because you may need them for other issues relating to the estate.