



1812 East Blvd. FAX: 704-372-2753  
Charlotte, NC 28203 TEL: 704-625-4040

[www.piferestatelaw.com](http://www.piferestatelaw.com)  
info@piferestatelaw.com

*The Law Office of Deni C. Pifer, PC*  
Member of North Carolina and South Carolina Bars

**A. DECEDENT INFORMATION:**

**Full Name of Decedent:** \_\_\_\_\_

**City and State of Death:** \_\_\_\_\_

PLEASE BRING the following to your meeting:

**WILL & CODICILS (if any)**  
**Trust(s) if any**  
**Death Certificate**

**Was the Decedent known by any other names? If so, please list:**

\_\_\_\_\_

**B. EXECUTOR or person applying for ADMINISTRATOR INFORMATION:**

**NAME:** \_\_\_\_\_ **Relationship to Decedent:** \_\_\_\_\_

**Address:** \_\_\_\_\_ (street)  
\_\_\_\_\_ (city, state, zip)  
\_\_\_\_\_ (county)

**Email Address (es):** \_\_\_\_\_  
\_\_\_\_\_

**Telephone numbers:** \_\_\_\_\_ (home)  
\_\_\_\_\_ (cell)

**Social Security Number:** \_\_\_\_\_



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**C. BENEFICIARY INFORMATION:**

**Please list all Beneficiaries: (attach separate list if necessary)**

1. **Name:** \_\_\_\_\_  
**Relationship to Decedent:** \_\_\_\_\_  
**Address:** \_\_\_\_\_ (street)  
\_\_\_\_\_ (city, state, zip)  
\_\_\_\_\_ (county)  
**Age or Birthdate:** \_\_\_\_\_
  
2. **Name:** \_\_\_\_\_  
**Relationship to Decedent:** \_\_\_\_\_  
**Address:** \_\_\_\_\_ (street)  
\_\_\_\_\_ (city, state, zip)  
\_\_\_\_\_ (county)  
**Age or Birthdate:** \_\_\_\_\_
  
3. **Name:** \_\_\_\_\_  
**Relationship to Decedent:** \_\_\_\_\_  
**Address:** \_\_\_\_\_ (street)  
\_\_\_\_\_ (city, state, zip)  
\_\_\_\_\_ (county)  
**Age or Birthdate:** \_\_\_\_\_
  
4. **Name:** \_\_\_\_\_  
**Relationship to Decedent:** \_\_\_\_\_  
**Address:** \_\_\_\_\_ (street)  
\_\_\_\_\_ (city, state, zip)  
\_\_\_\_\_ (county)  
**Age or Birthdate:** \_\_\_\_\_



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Estimated Market Value

ASSET	Owner	Institution	Contact Info
Checking Accounts			
Savings Accounts			
Personal Property			
Investment Accounts			
Other Stocks			
Bonds			
Loans to others (notes or mortgages receivable)			
Residence			
Real Estate (Please list in which state real estate is locate)			
Business Interests			
Pension			



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<b>ASSET</b>	<b>Owner</b>	<b>Institution</b>	<b>Contact Info</b>
IRA and/or 401(k)  BENEFICIARY:			
Automobiles :( Please send original titles)			
Collectibles, etc.			
<b>LIFE INSURANCE:</b>	<b>Company</b>	<b>Face Amount</b>	<b>Beneficiary</b>

OTHER NOTES:

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