HEIR SEARCH INTAKE QUESTIONNAIRE

For probate attorneys, executors and trustees. Complete what you can; "unknown" is a useful answer.

1. About the case

Attorney and firm	
Client name and role (executor, administrator, trustee, other)	
Court, county and state	
Case number	
Hearing or filing deadline	
Is there a will? (Yes / No / Unsure)	
Search for: notice, distribution, or both	
Shares divide: per stirpes, per capita, or unsure	

2. The decedent

Full legal name	
Other names used (maiden, married, nicknames, spellings)	
Date and place of birth	
Date and place of death	
Last address	
Places lived (cities, states, countries, approximate years)	
Marriages and divorces (names, dates, places)	

Military service	
Immigration or emigration (country, approximate years)	
Occupation and employers	
Religious affiliation or congregation	

3. Spouse and children

Include children who died, children from any relationship, adopted children and any child the family has heard rumors about.

Surviving spouse or partner (name, contact)	

Child's name	Living / deceased (date)	Other parent	Last known location or contact

4. Parents and siblings

Mother (full name, including maiden name; dates)	
Father (full name; dates)	

Sibling's name (note half-siblings)	Living / deceased (date)	Children of the sibling	Last known location or contact

5. Extended family

Maternal grandparents (names, places)	
Paternal grandparents (names, places)	
Aunts and uncles you know of	
Cousins you know of	

6. Gaps and red flags

Relatives nobody has heard from, or who are estranged	
Possible children nobody knows about	
Relatives who may live abroad	
Name changes, adoptions or other family secrets	
Relatives who may have died (and when)	
Family disputes or contested claims	

Other considerations (incarceration, homelessness, health)	
When did the family last have contact with each missing person?	

7. Documents you have

□ Death certificate

□ Will and codicils

□ Obituary or funeral program

□ Birth, marriage or divorce records

□ Family tree, family Bible or address book

□ Prior affidavit of heirship or court filings

□ Letters, emails or photos naming relatives

8. Where this information came from

Name	Relationship to the decedent	Phone or email	What they told you

Questionnaire by HeirPros (heirpros.com/heir-search-intake-questionnaire). Send the completed form through heirpros.com/contact-us for a flat-fee heir search quote, or get an instant estimate at heirpros.com/heir-search-quote-calculator. Your information is never shared.