



Greensboro Office ☐
620 Green Valley Rd, Ste 307
Greensboro, NC 27408
TEL (336) 355-2355
FAX (336) 370-1789

High Point Office ☐
1810 Westchester Dr.
High Point, NC 27261
TEL (336) 883-6177
FAX (336) 883-6647

Asheboro Office ☐
111 Worth Street
Asheboro, NC 27203
TEL (336) 625-3043
FAX (336) 625-0913

ESTATE INFORMATION SHEET

Full Name of Decedent _____

Other names, if any, Decedent was known as _____

Date of Death _____ County of Death _____

Address at Date of Death _____

Did Decedent leave a Will? ☐ Yes ☐ No If yes, date of Will _____

Executor named in the Will: _____ Phone: _____

Address: _____

Did the decedent own real property in this County? Name Only _____ with Spouse _____

Did decedent own real property outside of this County: Name Only _____ with Spouse _____

If so, where is real property located at: _____

Personal Property Owned by Decedent: _____

(Bank accts, motor vehicles, mobile homes, stocks, bonds, etc.)

Did decedent belong to a membership utility (e.g., Randolph or Guilford County Communications, REMC, Energy United, etc.)? No _____ Yes _____ If yes, which one? _____

Decedent was _____ married _____ separated _____ legally divorced _____ single _____ widowed

If married or separated? Spouse's name _____

Address _____

Phone _____

How many children, if any, survived the decedent? _____

LIST OF HEIRS:

If Decedent died without a will, please list ALL children of Decedent without regard to the identity of their other parent. Include any adopted and pre-deceased children and note as such. Provide date of birth if child is younger than 18. Attach a separate page if needed.

Name	Relationship to Decedent	Address	Age
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

FUNERAL HOME

Has funeral bill been paid/pre-paid? _____ Yes No

If yes, by whom? _____

DEBTS OWED BY DECEDENT:

Creditor	Type of Account	Amt Owed
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Hyatt/ARAG Legal Plan: Yes: ____ No: ____ Employer _____ SS _____

Case No. (s) _____

Should you have additional information – Please feel free to attach other sheets as necessary



Greensboro Office ☐

620 Green Valley Rd, Ste 307
Greensboro, NC 27408
TEL (336) 355-2355
FAX (336) 370-1789

High Point Office ☐

1810 Westchester Dr.
High Point, NC 27261
TEL (336) 883-6177
FAX (336) 883-6647

Asheboro Office ☐

111 Worth Street
Asheboro, NC 27203
TEL (336) 625-3043
FAX (336) 625-0913

Please bring the following documents to any of our three locations or email them to kayla@iveyeggleston.com

We realize this is a lot of information; however, it is very important that we have this information to be effective in the administration of the decedent's estate. Please collect as much of this information as you have readily available. If you have any difficulties, please contact our office before you contact the Clerk of Court as we will be assisting you with corresponding with their office.

1. Certified death certificate, original will and any memorandums to will & any living or testamentary trust documents;
2. **Copy of your Driver's License;**
3. Copy of decedent's marriage certificate if there is a surviving spouse.
4. List of heirs w/full "legal" name, address, email address, marital status, and dates of birth if under age 18;
5. Vehicle Titles, Registration Cards and/or Bill of Sales (automobiles, boats, boat motors, trailers, airplanes, etc.) for tagged and untagged; Are there loans secured by a lien on any vehicle, boat, etc.?
6. Deeds and/or tax bills for any interest in real property owned. Any outstanding loans owed on the properties?
7. Most recent statements for any financial account such as bank statements, broker statements, IRA, or annuity statements.
8. Stock certificates or stubs from stock dividend checks received by the decedent;
9. Life insurance policies;
10. Most recent income tax returns;
11. Funeral bill and paid receipt if already paid.
12. Copy of utility bill in decedent's name for services with Randolph Electric, Randolph Communications, Energy United or any other cooperative membership – Capital credits may be due to the decedent.
13. Copies of statements for any debt owed by the decedent – Loan statements, credit card statements, insurance billing, medical bills, etc.
14. Any other document showing ownership by the decedent. If you are unsure, please bring those documents in for our office to review. Are there any specific items of valuable personal property owned by the decedent that are not described above?