



HEIRS DETERMINATION WORKSHEET

We use this worksheet for the sole purpose of identifying heirs or potential heirs of an estate. Preparation of this worksheet is not mandatory prior to the initial appointment with us, but if we receive the completed worksheet prior to or at the time of your appointment, we can better and more completely advise you during the initial consultation.

During the initial appointment, we will discuss your specific goals and how to best plan for the administration of the estate.

Please remember this worksheet is just a starting point and the questions contained herein may certainly require additional investigation. Just do the best you can with it.

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(b) Children of decedent born out of wedlock:

Living Children		Deceased Children	
<u>Name</u>	<u>Age</u>	<u>Name</u>	<u>DOD</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

NOTE: IF ALL OF THE CHILDREN OF DECEDENT ARE ALIVE, YOU MAY STOP.

3. Grandchildren of the decedent:

Living Grandchildren		
<u>Name</u>	<u>Age</u>	<u>Parent's Name</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Deceased Grandchildren		
<u>Name</u>	<u>DOD</u>	<u>Parent's Name</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

NOTE: IF ALL OF THE GRANDCHILDREN OF THE DECEDENT ARE ALIVE, YOU MAY STOP.

4. Great-grandchildren of the decedent:

<u>Name</u>	Living Great-grandchildren	
	<u>Age</u>	<u>Parent's Name</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

<u>Name</u>	Deceased Great-grandchildren	
	<u>DOD</u>	<u>Parent's Name</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

NOTE: IF ALL OF THE GREAT-GRANDCHILDREN OF THE DECEDENT ARE ALIVE, YOU MAY STOP. IF THERE ARE ANY DECEASED GREAT-GRANDCHILDREN, YOU MUST ATTACH AN ADDITIONAL SHEET FOR THEIR CHILDREN.

5. Mother and father of the decedent:

<u>Name</u>	<u>Age</u>	<u>Date of Death, if Deceased</u>
Mother: _____	_____	_____
Father: _____	_____	_____

NOTE: IF ANY PARENT IS ALIVE, YOU MAY STOP.

6. Brothers and Sisters of the Decedent:

<u>Name</u>	Living Brothers and Sisters		<u>Name</u>	Deceased Brothers and Sisters	
	<u>Age</u>				<u>DOD</u>
_____	_____		_____		_____
_____	_____		_____		_____
_____	_____		_____		_____
_____	_____		_____		_____
_____	_____		_____		_____

NOTE: IF ALL OF THE BROTHERS AND SISTERS OF THE DECEDENT ARE ALIVE, YOU MAY STOP.

Deceased aunts and uncles

<u>Name</u>	<u>DOD</u>	<u>Parent's Name</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

NOTE: IF ALL OF THE AUNTS AND UNCLES OF THE DECEDENT ARE ALIVE, YOU MAY STOP.

11. First Cousins of the decedent who are alive:

<u>Name</u>	<u>Age</u>	<u>Parent's Name</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

NOTE: IF ANY FIRST COUSINS ARE ALIVE, YOU MAY STOP.

12. The more remote degrees of kinship are determined by counting the number of steps in the chain from the claimant to the closest common ancestor of the claimant and the decedent, and from said ancestor back to the decedent. The sum of the two chains is the degree of kinship. The surviving relatives who have the lowest sum are in the nearest degree and thus inherit the estate equally.

Submitted by:

Print Your Name

Sign Your Name

Date