

Here is a preview of the types of questions you will need to answer on the following pages.

- What is the full legal name of the person who has died
- Was he or she known by any other name? If so, what name(s)
- Where did he or she live?
- Do you have a death certificate for the person?
- If he or she did not live in Oklahoma, did they own real estate (including mineral rights) in Oklahoma? What county(s) is the real estate in?
- What is your relationship to the deceased person (spouse, son, daughter, friend, grandchild, named in the will, etc.)?
- Did the deceased person have a Last Will and Testament?
- What is the date of the Will?
- Is the Will handwritten by the deceased person?
- Is the Will typed or written by someone other than the deceased person?
- Does the Will have at least two witnesses?
- Is the Will notarized?
- Does either witness inherit in this Will?
- Did the deceased person have a spouse who was still alive when the decedent died?
- List all people (full name) who might inherit through this Will
- Did the decedent have any children?
- How many children were alive at the time this person died? List them here
- Did the decedent have any child(ren) who died after decedent?
- If the decedent had deceased child(ren), and if the deceased child left children living, list them here
- If decedent left no child(ren) did he or she leave a surviving parent(s)?
- If no surviving parent(s), did he or she leave surviving brother(s) or sister(s)?
- What did the decedent own at the time they died?
(do not include accounts with payable on death designations)?
- Is there another account?
- Investment account(s)
- Did the deceased person own any real estate? If yes, please give as much information as possible:
- Did the deceased person own any vehicle(s) If so, describe here
- Did he or she own any other item(s) valued over \$500? (jewelry, tractor, livestock, coin collection, etc.) If so, describe here with reasonable detail and value
- Who is named as 1st choice as Personal Representative/Executor in the Will?
- If yes, has he or she ever been convicted of a felony?
- If the 1st choice as Personal Representative (aka executor/executrix) is unable or unwilling to serve, who is the 2nd choice?
- . Is he or she willing and able to serve?
- If there is no person named as Executor or Personal Representative in the Will, or if the nominees are unwilling or unable to serve, who will be the Executor?
- Has this person been convicted of any felony?
- When was the original Will last seen?
- Is the person(s) who saw the Will willing and able to testify?
- Do you have access to a copy of that Will?
- What happened to the original Will?

- Who will be the Personal Representative/Executor?
- Has this person ever been convicted of a felony?
- If that person has been convicted of a felony, who is the 2nd choice?
- Is this person convicted of any felony?
- Did the deceased person have a spouse who was still alive when the decedent died?
- Did the decedent have any children?
- How many children were alive at the time this person died? List them here:
- Did the decedent have any child(ren) who died after decedent?
- If decedent left no child(ren) did he or she leave a surviving parent(s)?
- If no surviving parent(s), did he or she leave surviving brother(s) or sister(s)?
- What did the decedent own at the time they died? (do not include accounts with payable on death designations)?
- Financial accounts:
- Is there another account?
- (If you do not yet know the legal description, you can usually get that from the County Assessor or County Clerk where the land is located. You will need this information before the case can close successfully, but it is not urgent that you have this at the beginning)