



SUCCESSION INFORMATION FORM

Once this form is completed,
mail or fax it as follows:

Mail to:
The Koehler Firm
3350 Ridgelake Dr.
Suite 200
Metairie, LA 70002

Fax to:
504-837-7988

Please list your contact information:

Name: _____

Phone: _____

Date this form completed _____

Information About the Decedent

Full Legal Name	
Address at Time of Death	
Date of Death	
Social Security Number	
Marital Status (Circle one. If Decedent was married more than once, attach a full marital history)	Single Married Divorced Widowed If divorced, date of divorce : _____ If widowed, date of spouse's death: _____
Had Decedent executed a will?	Yes No
If yes, do you have the original?	Yes No

Spouse Information (If married to Decedent at time of Decedent's death)

Full Legal Name (Including maiden name)	
Address at Time of Decedent's Death	
Social Security Number	
Date of Birth	

Real Estate

Address of Property	Value of Property	Value of Decedent's Share
Is legal description attached?* Y N		
Is legal description attached?* Y N		
Is legal description attached?* Y N		

* (A formal legal description can be found on the document by which the Decedent acquired the property, probably an Act of Sale. If you do not have a formal legal description, we can get that from public records, but there will be an extra charge, probably between \$20 and \$50.)

Vehicles (List all vehicles, trailers, boats, etc. which are registered with the Dept of Motor Vehicles)

Year, Make & Model	VIN (if available)	Value of Vehicle	Value of Decedent's Share

Bank Accounts

Bank Name	Account Number	Balance	Decedent's Share of Balance

Other Property (e.g., stocks, bonds, mutual funds, mineral leases, valuable jewelry, or works of art)

Description & Details	Balance/Value	Decedent's Share of Balance/Value

Privileged Debts - Funeral & Burial Expenses

List all expenses incurred in connection with the Decedent's funeral and burial.
 If the Decedent had pre-paid funeral expenses, note that in the column at the right.

Provider	Amount Paid	Pre-paid by Decedent?
		Y N
		Y N
		Y N
		Y N

Mortgages and Other Secured Debts

Creditor	Property Mortgaged or Encumbered	Decedent's Share of Balance Owed
Name: Acct #		
Name: Acct #		
Name: Acct #		
Name: Acct #		

Unsecured Debts

Creditor	Account Number	Decedent's Share of Balance Owed
Name: Acct #		
Name: Acct #		
Name: Acct #		
Name: Acct #		
Name: Acct #:		

Miscellaneous Questions

(If you answer yes to any of these questions, we may need to telephone you to ask specific questions.)

Do all the heirs agree to accept their share of the inheritance? By accepting their share of the inheritance, they agree to be liable for any debts of the Decedent, up to the value of what they have received.	Y	N
Did the Decedent have any contingent liabilities, such as a guaranty for the debt of another person?	Y	N
Did the Decedent own a business or was the Decedent a partner in a business?	Y	N
Did the Decedent have life insurance, annuities, or retirement benefits which named a beneficiary who is deceased?	Y	N
Is Decedent an heir of someone for whom a succession has not yet been completed?	Y	N
Does any heir have tax liens or judgments against him or her?	Y	N
Has any heir filed for bankruptcy protection since the Decedent died?	Y	N
Is any heir receiving Medicaid benefits?	Y	N

Heirs

Include as much information as you can about each heir. If you are not sure who is an heir, review the FAQ section of www.LouisianaSuccessions.com, under the question "Who inherits property?" If any person who would be an heir has died, either before or after the Decedent, list that person's name and the date of death. On a separate sheet, list that person's children, with the appropriate information for those children.

Name		
Address		
Social Security Number *	Date of Birth	Relationship to Decedent

Name		
Address		
Social Security Number *	Date of Birth	Relationship to Decedent

Name		
Address		
Social Security Number *	Date of Birth	Relationship to Decedent

Name		
Address		
Social Security Number *	Date of Birth	Relationship to Decedent

Name		
Address		
Social Security Number *	Date of Birth	Relationship to Decedent

* Social Security Number is only needed if Decedent died before July 1, 2004.

I realize that the Koehler Firm will rely upon the accuracy of the information provided in this Succession Information Form when preparing the documents that I will execute, and when quoting to me the fee that will be charged. The Koehler Firm is not required to independently verify any of this information, and I agree to indemnify and hold The Koehler Firm harmless from any loss which may occur if any of the information provided herein is inaccurate or incomplete.

Sign here: _____

The following list contains items which help us to accurately prepare the succession paperwork. Please send copies of the following documents, if you have them available. If you do not have access to them, send what you have. We will contact you if we have any questions about any item.

1. Document whereby Decedent acquired ownership of real estate. This may include an Act of Sale, a Judgment of Possession for inherited property, etc.
2. Decedent's will, if applicable
3. Death Certificate
4. Certificate of Title or Registration for any items listed under "Vehicles"
5. Bank statement for each account for the period which includes, or is close to, the date of death of Decedent
6. Statements or bills from creditors for each account for the period which includes, or is close to, the date of death of Decedent.