

# Estate Questionnaire

New Jersey Decedent

IN CONNECTION WITH THE ESTATE OF \_\_\_\_\_, DECEASED

PERSONAL REPRESENTATIVE (EXECUTOR or ADMINISTRATOR): \_\_\_\_\_

1. STATE THE DATE OF DEATH \_\_\_\_\_  
(IF DATE OF DEATH IS LESS THAN ONE YEAR FROM PRESENT DATE, PLEASE SIGN **INDEMNITY OF ESTATES DEBTS** FORM PROVIDED BY THE COMPANY)
2. STATE THE PLACE OF DEATH \_\_\_\_\_
3. DID DECEDENT LEAVE A LAST WILL AND TESTAMENT?  YES  NO  
IF YES, WHERE WAS THE WILL PROBATED? STATE: \_\_\_\_\_ COUNTY: \_\_\_\_\_
4. HAS A CAVEAT BEEN FILED OR THREATENED TO BE FILED AGAINST THE WILL?  
 YES  NO
5. IF DECEDENT DID NOT LEAVE A WILL WHERE AND WHEN WERE LETTERS OF ADMINISTRATION ISSUED?  
STATE: \_\_\_\_\_ COUNTY: \_\_\_\_\_  
DATE LETTERS ISSUED: \_\_\_\_\_

6. WHO ARE THE DEVISEES OR HEIRS AT LAW OF THE DECEDENT AND WHAT IS THEIR RELATIONSHIP TO THE DECEDENT?

**Name**

**Relationship**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

USE ADDITIONAL PAGE(S) FOR MORE NAMES.

7. STATE APPROXIMATE **GROSS** VALUE OF ESTATE AS COMPUTED UNDER FEDERAL LAW.  
\_\_\_\_\_
8. STATE APPROXIMATE OF CASH AND LIQUID SECURITIES NOW HELD IN THE ESTATE ACCOUNT.  
\_\_\_\_\_

CONTINUED ON NEXT PAGE

9. WHAT IS THE TOTAL APPROXIMATE AMOUNT OF UNPAID DECEDENT DEBTS?

\_\_\_\_\_

IS ANY CLAIM OR ACTION PENDING OR THREATENED, TO YOUR KNOWLEDGE, BY ANY CREDITOR?

YES  NO IF YES, STATE PARTICULARS.

\_\_\_\_\_

10. HAVE **NEW JERSEY TRANSFER INHERITANCE** TAXES, IF ANY, BEEN PAID?  YES  NO

IF YES, WHAT AMOUNT? \_\_\_\_\_

HAS AN INHERITANCE TAX WAIVER BEEN RECORDED?  YES  NO

IF NO, STATE THE ESTIMATED AMOUNT OF NJ INHERITANCE TAX DUE ON THE ESTATE

\_\_\_\_\_

11. HAVE **NEW JERSEY ESTATE** TAXES, IF ANY, BEEN PAID?  YES  NO

IF YES, WHAT AMOUNT? \_\_\_\_\_

HAS AN NEW JERSEY ESTATE TAX WAIVER BEEN RECORDED?  YES  NO

IF NO, STATE THE ESTIMATED AMOUNT OF NJ ESTATE TAX DUE ON THE ESTATE

\_\_\_\_\_

12. HAVE **FEDERAL ESTATE** TAXES, IF ANY, BEEN PAID?  YES  NO

IF YES, WHAT AMOUNT? \_\_\_\_\_

HAS A CLOSING LETTER (IRS FORM LETTER 627) BEEN RECEIVED FROM THE IRS? ( ) YES ( ) NO

IF NO, STATE THE ESTIMATED AMOUNT OF FEDERAL ESTATE TAX DUE ON THE ESTATE

\_\_\_\_\_

13. HAS DISTRIBUTION OF ANY ESTATE ASSETS BEEN MADE?  YES  NO

IF YES, PLEASE GIVE DETAILS. \_\_\_\_\_

\_\_\_\_\_

THE ABOVE INFORMATION IS SUBMITTED TO \_\_\_\_\_ (Title Insurance and/or Settlement Agency) AND \_\_\_\_\_ (Title Insurance Underwriter) KNOWING IT WILL BE RELIED UPON TO ISSUE A POLICY OF TITLE INSURANCE AFFECTING PREMISES OWNED BY THE DECEDENT INSURING AGAINST COLLECTION OF ANY DEBTS OF DECEDENT OUT OF PREMISES IN QUESTION AND ANY TAXES DUE FROM THE ESTATE. **THE UNDERSIGNED HEREBY REPRESENTS AND WARRANTS THAT ALL OF THE DECEDENT'S DEBTS HAVE OR WILL BE PAID, AND ALL NEW JERSEY INHERITANCE TAXES, NEW JERSEY ESTATE TAXES AND FEDERAL ESTATE TAXES HAVE OR WILL BE PAID.**

DATED: \_\_\_\_\_, 20 \_\_\_\_

ESTATE OF \_\_\_\_\_, deceased

WITNESS:

\_\_\_\_\_

Signed: \_\_\_\_\_

Print name of Personal Representative:

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_