



WILLIS & CAGLE LAW FIRM

118 E. Graham Avenue | P.O. Box 1062 | Pryor, Oklahoma 74362 | (918) 876-5605

CLIENT INTAKE FORM PROBATE

CLIENT INFORMATION

Legal Name (Last, First, Middle)

Date of Birth

Current Address (Street, City, State, ZIP)

Telephone Number

Best Time of Day to Reach You

Email Address

Employer Name

Employer Phone Number

Employer Address

Occupation / Position

The information above should reflect you, the person completing this form (e.g., proposed Personal Representative or an heir).

DECEDENT INFORMATION

Decedent's Full Legal Name

Date of Death

Date of Birth

County of Residence at Death

Prefer to complete your form by hand? Print the form and bring it to your meeting or contact our office at (918) 876-5605 and we'll have one ready for you at your appointment.

Decedent's Address at Time of Death

Did the Decedent Leave a Will? (Yes / No / Unknown)**Location of Original Will, if known**

Nominated Executor/Personal Representative per the Will (if applicable)

HEIRS-AT-LAW AND BENEFICIARIES

Oklahoma probate law requires that all heirs-at-law and named beneficiaries be identified and given notice of the proceeding. Please list every spouse, child, and other heir-at-law, and any beneficiary named in a will, along with current contact information.

Full Legal Name	Relationship to Decedent	Adult or Minor	Address	Phone/Email

ESTATE ASSETS (GENERAL OVERVIEW)**Real Property (Address, Approximate Value)**

Bank Accounts, Investments, Retirement Accounts, Life Insurance (Institution, Approximate Value, Beneficiary Designations if Known)

Vehicles, Business Interests, and Other Significant Personal Property

Known Outstanding Debts or Claims Against the Estate

ADDITIONAL INFORMATION

Is there any dispute among heirs or beneficiaries that you are aware of? (Yes / No — if yes, please describe)

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