



McFARLAND  
& LORD LLC



Probate & Trust Administration  
**ORGANIZER**

Client(s): \_\_\_\_\_  
\_\_\_\_\_

**Berthoud Office:**  
1201 Lake Ave., Suite A  
Berthoud, Colorado 80513  
(970) 532-4183

**Golden Office:**  
910 13th Street, Suite 200  
Golden, Colorado 80401  
(303) 279-8300

[www.McFarlandLord.com](http://www.McFarlandLord.com)



## Decedent Information ■

**DECEDENT:** \_\_\_\_\_

(Name most often used to title property and accounts)

SS#: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Date of Death: \_\_\_\_\_ Age at Time of Death: \_\_\_\_\_

Home Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

County of Residence: \_\_\_\_\_ Date of Last Will: \_\_\_\_\_ Date of Codicil(s): \_\_\_\_\_

US Citizen:  Yes  No  Single  Married (Date: \_\_\_\_\_)  Divorced (Date: \_\_\_\_\_)

## Spouse / Personal Representative Information ■

**SPOUSE:** \_\_\_\_\_

(Name most often used to title property and accounts)

SS#: \_\_\_\_\_

Also Known As/Preferred Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Home Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

County of Residence: \_\_\_\_\_ Phone: \_\_\_\_\_ Email: \_\_\_\_\_

US Citizen:  Yes  No  Single  Married (Date: \_\_\_\_\_)  Divorced (Date: \_\_\_\_\_)

If Spouse is Deceased, Provide Date of Death: \_\_\_\_\_

**PERSONAL REPRESENTATIVE:** \_\_\_\_\_

(Legal Name of Personal Representative or Nominate)

SS#: \_\_\_\_\_

Also Known As/Preferred Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Home Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

County of Residence: \_\_\_\_\_ Phone: \_\_\_\_\_ Email: \_\_\_\_\_



## Important Questions ■

1. Are there any pre- or post-nuptial agreements? *If so please describe:*

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2. Are there any divorce decrees or other court orders involving the deceased which may be relevant to the probate proceeding? *If so, give details:*

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3. Please provide the names and addresses of all immediate family members in the spaces below:

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4. If anyone is listed in the decedent's will or codicil(s) other than those persons named above, please provide the names and addresses in the spaces below:

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## Assets of the Decedent ■

Please list the assets of the decedent. Attach additional pages if necessary. **IMPORTANT:** List the exact name in which the title is held and provide documentation of ownership.

**REAL PROPERTY:** List any real estate including family residence, vacation home, commercial property, vacant land, time share, etc. *Please specify if any property is jointly owned.*

GENERAL DESCRIPTION	OWNER(S)	FAIR MARKET VALUE
TOTALS		

**AUTOMOBILES, BOATS AND RV'S:** For every vehicle please specify if jointly owned.

GENERAL DESCRIPTION	OWNER(S)	FAIR MARKET VALUE
TOTALS		

**CASH ASSETS:** Please specify if any accounts are jointly owned.

GENERAL DESCRIPTION	OWNER(S)	FAIR MARKET VALUE
TOTALS		



## STOCKS/BONDS:

GENERAL DESCRIPTION	OWNER(S)	FAIR MARKET VALUE
TOTALS		

## LIFE INSURANCE POLICIES: For each, please specify if jointly owned.

GENERAL DESCRIPTION	OWNER(S)	FAIR MARKET VALUE
TOTALS		

## JEWELRY:

GENERAL DESCRIPTION	OWNER(S)	FAIR MARKET VALUE
TOTALS		

## OTHER PERSONAL PROPERTY: List coin/stamp collections or any other extraordinary personal property.

GENERAL DESCRIPTION	OWNER(S)	FAIR MARKET VALUE
TOTALS		



## Additional Questions ■

1. Was the decedent a beneficiary of a trust? *If so, please give details.*

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2. Did the decedent own any interest in a partnership or business? *If so, give details:*

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### PLEASE PROVIDE OUR OFFICE WITH THE FOLLOWING:

- Original will and any codicils
- Death certificate
- Deeds/title to any property owned by the deceased
- Statements to bank accounts, stocks, bonds, etc.
- Any known bills or creditors of the decedent

*Please accept our condolences on your loss. Our goal is to make the administrative process as efficient and cost effective as possible. Please complete this organizer as fully as possible and return it to us at your earliest convenience so that you will gain the most during our upcoming conference.*

### WE SUGGEST YOU:

1. Complete the organizer safely and securely on-line by visiting our Trust & Probate page at [www.mcfarlandlord.com](http://www.mcfarlandlord.com)
2. Drop it off at either our Berthoud or Golden office; or
3. Contact Kim Schmad via e-mail ([kim@mcfarland.law](mailto:kim@mcfarland.law)) or phone (970.532.4183) so that we can send you a secure e-mail link to upload your completed organizer.

## Notes ■

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