

# LEGACY ESTATES & TRUSTS, PLLC

*www.mylegacyfirm.com*

**Arkansas Office:** 900 W. Center St., Beebe, Arkansas 72012 | 501-882-6599

**Missouri Office:** 5709 Telegraph Rd., St. Louis, Missouri 63129 | 314-846-5005

**Scott Bles, Attorney at Law\*** ( sbles1997@gmail.com )

**P. Jeff Hoggard, Attorney at Law+** ( jeff.hoggard@gmail.com )

**Facsimile: 866-423-3341**

**\* Licensed in Arkansas & Missouri**

**+ Licensed in Arkansas**

---

DATE: \_\_\_\_\_

Your Full Name: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Social Security #: \_\_\_\_\_

Email: \_\_\_\_\_ Phone: \_\_\_\_\_

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

Employer & Address: \_\_\_\_\_

Date of Marriage (if married): \_\_\_\_\_

Spouse's (if applicable) Full Name: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Social Security #: \_\_\_\_\_

Email: \_\_\_\_\_ Phone: \_\_\_\_\_

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

Employer & Address: \_\_\_\_\_

DECEDENT'S Full Name: \_\_\_\_\_

DOB: \_\_\_\_\_ SS #: \_\_\_\_\_ DL #: \_\_\_\_\_

Decedent's Former Employer & Address: \_\_\_\_\_

Address at Death: \_\_\_\_\_

All Other Beneficiaries' Full Legal Names, Addresses, Phone Numbers, Email Addresses, DOB's, & SS#'s:

1)

---

2)

---

3)

---

4)

---

5)

---

6)

---

**PLEASE ATTACHED THE ORIGINALS OF ANY WILLS, CODICILS, TRUSTS, TRUST AMENDMENTS, AND DEATH CERTIFICATES.**

**PLEASE ATTACH A LIST OF OR STATEMENTS CONFIRMING ALL ASSETS AND DEBTS THAT WERE PART OF THE DECEDENT'S PROBATE AND/OR TRUST ESTATE AT THE TIME OF THE DECEDENT'S DEATH. PLEASE INCLUDE AND ATTACH ANY RELEVANT DEEDS, TITLES, ACCOUNT STATEMENTS, ETC. TO THIS QUESTIONNAIRE.**

-----  
*FOR OFFICE USE ONLY (DO NOT WRITE BELOW)*

SCOPE OF REPRESENTATION: \_\_\_\_\_

FEE STRUCTURE: \$ \_\_\_\_\_

LIMITATIONS OF REPRESENTATION: \_\_\_\_\_

RETAINER: \$ \_\_\_\_\_

REFERRAL: \_\_\_\_\_

APPROVED: \_\_\_\_\_

FOR FIRM

CLIENT

CLIENT