

## Pending Inheritance Worksheet

Your Name \*

Email Address \*

Contact Telephone \*

Contact Fax

First Name of Beneficiary \*

Last Name of Beneficiary \*

First Name of the Deceased \*

Last Name of the Deceased \*

Relationship to You \*

Date of Death \*

...

Did the Deceased have a Will? \*

Yes      No

Did the Deceased have a Trust? \*

Yes No

Have You Received any Inheritance to Date? \*

Yes No

Amount You Received \*

Have you borrowed against your future inheritance? \*

Yes No

If so, how much? \*

Estimated Amount of Inheritance \*

Advance You are Seeking \*

Location of Estate (State / Region / Province) \*

Name of Executor / Admin \*

Email of Executor / Admin \*

Phone of Executor / Admin \*

Fax of Executor / Admin.

First Name of Estate's Attorney \*

Last Name of Estate's Attorney

Estate Attorney's Phone \*

Law Firm Name of Estate Attorney \*

Estate Attorney's Email \*

Why are You Seeking this Advance & Additional Comments \*