

E. Steven Lauer, P.A.
Estate Administration Questionnaire
Ancillary Probate in New York

*Please either print this form and bring the completed form to your appointment or
download this form and email the completed form to slauer@verolaw.org before
your appointment*

1. If decedent owned any New York assets or had a New York bank account, complete the following:

a) Did decedent ever live in New York State? Yes [] No []

If so, during what periods? _____

b) How much time did the decedent spend in New York State and in the place of alleged domicile during the last five years immediately preceding death, and for what period or periods? _____

c) At what address or addresses did the decedent stay when in the State of New York and for what period or periods? _____

d) What was the nature of decedent's places of residence during the last five years immediately preceding death, indicating whether decedent resided in a house, rented or owned, apartment, hotel or at the home of relatives or friends? _____

- e) What and in what years did the decedent vote or register for voting during the five years immediately preceding death? _____

- f) If the decedent did not vote during such five years, where did he last vote and when? _____

- g) Did the decedent ever vote in the State of New York, and if so, in what years? _____

- h) To what state, county, or municipality and in what years did the decedent pay a tax on income or on intangible property during the last five years?

- i) In what business activities was the decedent engaged during the last five years immediately preceding death, indicating whether decedent was employed or otherwise engaged in business, and state the names and the addresses of the persons, firms or corporations with which the decedent had such business affiliations? _____

- j) If the decedent was ever engaged in business in the State of New York, set forth the nature of the business and its location and dates _____

- k) If the decedent was a citizen of the United States, did he at any time make application for a passport? _____

If so, give dates of application or renewals _____

- l) Did the decedent at any time during the last five (5) years immediately preceding death, execute a Will, Codicil, Trust Indenture, Deed, Mortgage, Lease, or any other document in which decedent was described as a resident of the State of New York? If so, describe such document and state what residence address or addresses were set forth therein. _____

- m) Was decedent a party to any legal proceeding in the State of New York during the last five years? _____

If so, what was the tribunal, date and type of action? _____

- n) Was decedent a member of any church, club or organization:

(1) In the State of New York? If so, give name, address and other details _____

(2) Outside of the State of New York? If so, give name and details

- o) What other information do you desire to submit in support of the contention that the decedent was not domiciled in the State of New York at the time of death? _____

p) Did the decedent at the time of death own, individually or jointly, any interest in real property, including leaseholds, or tangible personal property located in the State of New York? If so, describe in detail _____

q) What are the securities, bank accounts or other intangible property for which waivers are desired? (insert full description of each item) _____
