



ROYBAL-MACK & CORDOVA, P.C

1121 4th Street NW Albuquerque, NM 87102  
Phone: (505) 288-3500 Fax: (505) 288-3501 www.roybalmacklaw.com

**PROBATE CLIENT INFORMATION SHEET**

NAME: \_\_\_\_\_

BUSINESS: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_

STATE: \_\_\_\_\_

ZIP: \_\_\_\_\_

TELEPHONE: \_\_\_\_\_

E-MAIL: \_\_\_\_\_

SOCIAL: \_\_\_\_ - \_\_\_\_ - \_\_\_\_

DOB: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

DECEASED PARTY: \_\_\_\_\_

DECEASED PARTY ADDRESS: \_\_\_\_\_

DECEASED PARTY DOB: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

DATE OF DEATH: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

COUNTY OF RESIDENCE AT DEATH: \_\_\_\_\_

DECEASED PARTY SOCIAL: \_\_\_\_\_

EXECUTED WILL: Yes  No  Date: \_\_\_\_\_

REFERRED BY: \_\_\_\_\_

**OFFICE USE ONLY**

UNBUNDLED       CLC       ARAG

Fee Agreement    Initial \_\_\_\_\_ Date \_\_\_\_ / \_\_\_\_ / 2018       Tabs/PM:    Initial \_\_\_\_\_ Date \_\_\_\_ / \_\_\_\_ / 2018

New File:          Initial \_\_\_\_\_ Date \_\_\_\_ / \_\_\_\_ / 2018       Server:        Initial \_\_\_\_\_ Date \_\_\_\_ / \_\_\_\_ / 2018

**DEVISEES NAME IN THE WILL OR HEIRS**

NAME: ADDRESS RELATIONSHIP:		NAME: ADDRESS RELATIONSHIP:	
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