

Succession Checklist

Use this intake form to collect the decedent, heir, property, and estate details Southern Title needs to evaluate a Louisiana succession matter.

File number

Contact name and relation to decedent

Contact phone number

Contact email address

Decedent information

What is the full name of the decedent?

What is the date of death of the decedent?

What was the domicile and last known address of the decedent at the time of death?

What is the decedent's full marital history? Include how many times they were married, the names of their spouse or spouses, and whether each marriage ended by death or divorce.

Will and heirs

Was there a Last Will and Testament?

Yes

No

If yes, are you in possession of the original copy?

Yes

No

Did the decedent have children, either biological or adopted?

Yes

No

If yes, provide the full name, date of birth, and last known address of all children. Also note which, if any, are mentally or physically unable to handle their own affairs.

Are any of the decedent's children listed above deceased?

Yes

No

If yes, provide the full name, date of birth, and last known address of all children of the deceased heir, if any. Also note which, if any, are mentally or physically unable to handle their own affairs.

Property and estate assets

Did the decedent own property?

Yes

No

If yes, provide the full address of any and all property owned by the decedent.

Are the successors in the process of selling the property?

Yes

No

If yes, what is the estimated value of the property or properties?

Are there any other assets in the estate such as automobiles or bank accounts?

Yes

No

If yes, provide a full descriptive list of the other assets.

Flat fee

Full succession — \$3,500.00. This includes successions done under administration or independent administration, or to obtain a Judgment of Possession.

Affidavit of Small Succession — \$1,500.00. This is only for estates valued under \$125,000.00.

Flat fee is subject to change if additional work or expense is required due to the disclosure or discovery of new facts.

Notes