

**Inheritance Now, LLC**

**Fax (415) 446-2301**

**PERSONAL INFORMATION**

Name \_\_\_\_\_ Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
Work Phone (\_\_\_\_) \_\_\_\_\_ Cell Phone (\_\_\_\_) \_\_\_\_\_ Home Phone (\_\_\_\_) \_\_\_\_\_  
Email \_\_\_\_\_ Date of Birth \_\_\_\_/\_\_\_\_/\_\_\_\_ Social Security Number \_\_\_\_\_  
Driver's License No. \_\_\_\_\_ State of Issue \_\_\_\_\_ Expiration Date \_\_\_\_/\_\_\_\_/\_\_\_\_

**ESTATE INFORMATION**

Decedent's Name \_\_\_\_\_ Date of Death \_\_\_\_/\_\_\_\_/\_\_\_\_ Relation to Decedent \_\_\_\_\_  
\_\_\_\_% of inheritance you expect and amount \$ \_\_\_\_\_ Did the deceased leave a will, trust or neither? \_\_\_\_\_  
State where probate was filed \_\_\_\_\_ County of probate case \_\_\_\_\_ Probate Case No. \_\_\_\_\_  
Who is in charge of the Estate (Executor/Administrator)? \_\_\_\_\_ Phone (\_\_\_\_) \_\_\_\_\_  
Who is the Estate Attorney? \_\_\_\_\_ Phone (\_\_\_\_) \_\_\_\_\_ Fax Phone (\_\_\_\_) \_\_\_\_\_

**DOCUMENTS**

Please send the following documents to IN:

- Driver's License       Social Security Card
- Will       Petition for Probate       Inventory and Appraisal
- Death Certificate       Documents for any loan or assignment previously made against your inheritance
- Real Estate Listing Agreement    Proof of Insurance       Title report or appraisal

**PRIOR LOAN INFORMATION /JUDGMENT INFORMATION**

Have you borrowed against or assigned any portion of your inheritance?      If yes, how much? \$ \_\_\_\_\_  
Do you owe any child support? Yes / No      Do you have any outstanding judgments? Yes / No  
Do you owe any alimony? Yes/ No      Do you have any tax liens? Yes / No  
The amount of money I would like IN to advance me. \$ \_\_\_\_\_  
Reason for my advance: \_\_\_\_\_

**AUTHORIZATION TO RELEASE INFORMATION**

I/we have applied to Inheritance Now, LLC for financial Assistance. Inheritance Now, LLC is hereby authorized to obtain information in relation to decedent's debts in order to determine if there are sufficient funds in considering an advance. I/we authorize any party to release to Inheritance Now, LLC any requested credit or financial information about me, which may include savings and/or investment account balances, checking account balances, retirement account balances, consumer credit balances, and payment histories, including mortgage payment records and balances.

A photographic or carbon copy of this authorization (being a photographic or carbon copy of the signature(s) or the undersigned) may be deemed to be the equivalent of the original and may be used as a duplicate original.

Signature \_\_\_\_\_ Date \_\_\_\_/\_\_\_\_/\_\_\_\_

**Authorization to Estate Attorney**

**Authorization to Personal Representative  
(a/k/a Executor, Administrator, etc.)**

To: \_\_\_\_\_

To: \_\_\_\_\_

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

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone (\_\_\_\_\_) \_\_\_\_\_

Phone (\_\_\_\_\_) \_\_\_\_\_

Fax (\_\_\_\_\_) \_\_\_\_\_

Fax (\_\_\_\_\_) \_\_\_\_\_

Email \_\_\_\_\_

Email \_\_\_\_\_

Re: Estate of \_\_\_\_\_

I have applied for an advance against a portion of my expected beneficial interest in the above estate from Inheritance Now, LLC (IN), prior to a distribution from the estate.

Please forward the following documents to IN to complete my transaction:  
(Crossed off documents have already been submitted to IN)

- Will
- Death Certificate
- Real Estate Listing Agreement
- Proof of Insurance
- Petition for Probate
- Inventory and Appraisal
- Sales Contract for real estate
- Title report or appraisal
- Letters of Appointment

You may expect a call, email or letter from IN or one of it's attorneys as a part of their due diligence process. I would appreciate your cooperation with IN and request that you make available to them any information about the estate and my expected inheritance that they may request.

Signature: \_\_\_\_\_ Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

Your Name (printed): \_\_\_\_\_

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