

EstateFinance™
Fax (415) 499-0615

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 a copy of the following documents in to EstateFinance™:

- 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 EstateFinance™ for financial Assistance. EstateFinance™ 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 EstateFinance™ 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 EstateFinance™ (EF), prior to a distribution from the estate.

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

- 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 EF or one of it's attorneys as a part of their due diligence process. I would appreciate your cooperation with EF 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: _____