PROBATE CONSULTATION / 01

SEPARATE REPORTED AND REVIEWED STATUS

Broad labels only. Keep estate details, names and legal advice out. Ask counsel directly about urgent concerns.

A helpful preparation resource from PickYourPro.ai. Fill in digitally or print. Keep your completed copy private.

Broad consultation purpose / what I want an attorney to explain

Reported administration stage / uncertain or not yet reviewed by counsel?

Counsel-reviewed stage reference, if any / clarification still needed - no legal advice

My role question / what I need counsel to explain - do not assume authority

Record or communication label linked to that question / available, unavailable or unknown

Private intake and representation questions to ask the firm before sharing details

Preparation only. Not legal or tax advice, authority or beneficiary determination, filing, payment, distribution or deadline instructions, or representation. Keep private estate facts out.

PROBATE CONSULTATION / 02

CONNECT RECORD READINESS TO TASK SCOPE

R labels identify readiness, not required records. T labels refer only to work the attorney describes.

R1 / neutral record-type label / can locate? / original, copy or uncertain?

R2 / neutral record-type label / can locate? / original, copy or uncertain?

R3 / neutral record-type label / readiness unknown / question for private intake

T1 attorney-described task / responsible role / included, separate or unresolved

T2 attorney-described task / responsible role / included, separate or unresolved

T1/T2 / private input needed / status-update or closure question to clarify

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PROBATE CONSULTATION / 03

CHECK CONSULTATION READINESS

A check marks preparation only. It does not confirm legal status, authority, a completed task or a deadline.

- [ ] The consultation purpose is stated without private estate facts
- [ ] Reported status is separate from counsel-reviewed status
- [ ] Unknowns are marked rather than resolved by assumption
- [ ] Record labels omit contents and storage locations
- [ ] Role and authority questions are left for counsel
- [ ] Conflicts, private intake and whom counsel represents will be clarified
- [ ] Task descriptions and responsible roles come from the attorney
- [ ] Included, separate and unresolved work will be compared in writing

Reported-versus-reviewed status or role question still to clarify with counsel

Task boundary still open: administration, coordination, reporting or dispute work

Firm-confirmed private handoff method / next scope clarification - no credentials

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PROBATE CONSULTATION / 04

QUESTIONS FOR THE PROBATE ATTORNEY

Record general engagement answers only. This is not a place to copy private legal advice.

Experience: how does your practice relate to the help I want to discuss?

Intake: how are conflicts, private sharing and whom you represent explained?

Role: how will uncertain records and authority questions be reviewed?

Scope: what administration, reporting, coordination or dispute work is separate?

Tasks: who handles T1/T2, what input is needed, and how are updates provided?

Terms: fees, expenses, changes, completion records and transition arrangements?

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PROBATE CONSULTATION / 05

COMPARE THE PROPOSED RESPONSIBILITIES

Use A and B in each box. Compare the same questions and task map, not an assumed legal outcome.

Attorney A / B / consultation dates / broad purpose and task map discussed

Relevant experience, representation boundary and private intake process - A / B

T1/T2 roles, included work, separate services, updates and open questions - A / B

Fees, expenses, written terms, changes, completion or transition and fit - A / B

READY TO HEAR FROM PROS?

Optionally, Create an account on PickYourPro.ai and start a Probate Attorney request. Share only a general, non-confidential description so participating pros can compete with proposals. Compare experience, representation scope, fees, expenses and fit. A request does not create an attorney-client relationship.

One request. Every pro's best offer.

Start a request

Participation varies. A private consultation, conflicts check and record review may be needed before engagement.

Planning guide: https://www.pickyourpro.ai/services/attorney-probate

ABA: Executors and Trustees (official reference)

FTC: Hiring a Lawyer (official reference)

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