

Inheritance Advance Worksheet

First name _____ Last name _____

Address _____ Apt /Unit # _____

City _____ State _____ Zip _____

Phone number _____ Cell phone _____ Fax _____

E-Mail address _____

How much lump sum cash do you need now? \$ _____

Name of Deceased? _____ Date of Death _____

Relationship of Deceased to You _____

Amount you anticipate inheriting _____

Have you received any inheritance to date? Yes No If yes, amount _____

Have you borrowed against your inheritance? Yes No If yes, amount _____

State where is the estate located? _____ Estimated size of the estate _____

Executor's name _____ Phone _____

Attorney's name _____ Phone _____

What are your current needs? (Why would you like an inheritance advance)

Signature below authorizes First Capital, its funding sources, agents and/or assigns, to verify Probate and personal information from any source deemed appropriate for the purpose of evaluating this inheritance funding request.

_____ **Print Full Name** _____ **Signature** _____ **Date**

Complete the form, sign, date and return via email to our offices. You will receive a call from one of our underwriters within 24 hours of submission.

Inheritance documentation to include with your application:

- The death certificate for the person whose will you are named in
- A copy of the legal will, if such a document is available
- A document from the estate executor or administrator explaining who they are and their relation to the estate
- A second document from the executor or administrator that outlines the amount you will inherit
- A confirming document that explains who was named the estate administrator or executor