



Client Name: Case No:

Date Received:

(For office use only)

# LADY BIRD DEED QUESTIONNAIRE

## 2026

In Michigan, a Lady Bird Deed (also known as a Ladybird Deed or Enhanced Life Estate Deed) is a useful tool in estate planning. The Lady Bird Deed transfers to you an enhanced life estate, which allows you to sell, transfer, mortgage, divide, or otherwise dispose of your real property without the beneficiary's involvement. Upon your death the property transfers to your named beneficiary without needing to go through the expensive and time-consuming probate process.

## LADY BIRD DEED QUESTIONNAIRE

### SECTION A | EXPLANATION AND INSTRUCTIONS

#### EXPLANATION:

The purpose of this questionnaire is to assist with preparing a Lady Bird Deed. Michigan Indian Legal Services can draft many documents including Wills, Funeral Representative Designations, Lady Bird Deeds and General or Medical Durable Powers of Attorney. We are unable to assist with trusts.

#### INSTRUCTIONS:

1. Complete questionnaire. Attach additional sheets necessary.
2. Attach copies of deeds, if available.
3. Return to MILS by email  
[medednbach@mils3.org](mailto:medednbach@mils3.org) or by mail: Michigan  
Indian Legal Services  
814 S. Garfield Ave. Suite  
A Traverse City, MI  
49686
4. MILS will complete the Lady Bird Deed and return it to you (TRANSFER IS NOT YET COMPLETE.)
5. You must sign the deed in presence of a public notary. It is recommended you have the deed recorded at the county Register of Deeds office where the property is located. You should also store a copy in a safe location.
6. Please return a copy to MILS once executed.
7. We will close your case if we are unable to communicate with you or if we do not receive your complete questionnaire.

#### FREQUENTLY ASKED QUESTIONS

##### 1. What is a Lady Bird Deed?

In Michigan, a Lady Bird Deed (also known as a Ladybird Deed or Enhanced Life Estate Deed) is a useful tool in estate planning. The Lady Bird Deed transfers to you an enhanced life estate, which allows you to sell, transfer, mortgage, divide, or otherwise dispose of your real property without the beneficiary's involvement. Upon your death the property transfers to your named beneficiary without needing to go through the expensive and time-consuming probate process.

##### 2. Can I change or cancel the currently executed Lady Bird Deed?

Yes, to make changes you will need to have a new deed drafted and recorded. You can effectively cancel the Lady Bird Deed by having a new deed drafted which returns the interest you had transferred to the beneficiary back to you.

**SECTION B | GENERAL INFORMATION**

**CLIENT INFORMATION**

Full Legal Name: (including middle name)	
Address:	
City, State, Zip Code:	
County:	
Date of Birth:	
Last 4 digits of Social Security Number:	XXX-XX-
United States Citizen:	<input type="checkbox"/> Yes <input type="checkbox"/> No
Email Address:	
Phone Number:	
Spouse's Full Legal Name: (if Applicable)	
Name of Other Joint Owner:	

**BENEFICIARIES**

All people listed will have equal ownership upon transfer.

<b>Person 1</b>	
Full Legal Name: (including middle name)	
Address:	
City, State & Zip Code:	
Date of Birth:	
Phone Number:	

Lady Bird Deed Questionnaire

Married:	<input type="checkbox"/> Yes <input type="checkbox"/> No
Relationship:	

## Lady Bird Deed Questionnaire

<b>Person 2</b>	
Full Legal Name: (including middle name)	
Address:	
City, State & Zip Code:	
Date of Birth:	
Phone Number:	
Married:	<input type="checkbox"/> Yes <input type="checkbox"/> No
Relationship:	

<b>Person 3</b>	
Full Legal Name: (including middle name)	
Address:	
City, State & Zip Code:	
Date of Birth:	
Phone Number:	
Married:	<input type="checkbox"/> Yes <input type="checkbox"/> No
Relationship:	

**SECTION C | PROPERTY TO BE TRANSFERRED**

Please list the property you would like to transfer to the beneficiaries listed above. If you would like different properties to go to different beneficiaries, please use separate sheets.

<b>PROPERTY 1</b>					
Address:					
City, State, Zip:					
County:					
Parcel Number:					
Legal Description:					
Ownership:					
Date of Acquisition:			Cost:		
Current Market Value:		Amount of Debt:		Monthly Payments:	
Encumbrances (name of mortgages, lienors, etc.):					
<b>PROPERTY</b>					
Address:					
City, State, Zip:					
County:					
Parcel Number:					
Legal Description:					
Ownership:					
Date of Acquisition:			Cost:		
Current Market Value:		Amount of Debt:		Monthly Payments:	
Encumbrances (name of mortgages, lienors, etc.):					

Lady Bird Deed Questionnaire

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**SECTION D |  
ACKNOWLEDGEMENT**

Signature:	
Printed Name:	
Date:	