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ATTORNEYS AT LAW

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ESTATE ADMINISTRATION - INITIAL CHECKLIST

Please complete and acquire as much of the following as possible and bring this and the items to our office at the time of the initial meeting with the attorney.

Decedent’s name ____
SSN ___________________________ DOD ___________________
Spouse’s name ____
SSN ___________________________ DOD ___________________
At time of death: ☐ will ☐ no will ☐ living trust
Trustee/Executor/Administrator ______________________________________
Address ____
Phone No. __________________ Email address _________________________
Employer/contact: ___________/_________ Phone No. _______________
Attorney ____________________ Phone No. _______________
Accountant ____________________ Phone No. _______________
Broker/Financial Planner __________________ Phone No. _______________
Life Insurance Agent ____________________ Phone No. _______________
Approximate size of estate $ _______________

Documents needed (* = supply documents for month of decedent’s death):

________ 1. Death certificate (certified copy)
________ 2. Original Wills and Codicil(s), if any
________ 3. Original Trust and Amendment(s), if any
________ 4. Income Tax return (most recent three years)
________ 5. Gift tax returns (any that have been filed)
________ 6. Copies of checking account and CD statements *
________ 7. Current brokerage account statements *
________ 8. Copies of stock and bond certificates if not held by broker
________ 9. Copies of deeds to real property
________ 10. Copies of property tax bills for real estate owned
________ 11. Copies of life insurance policies or settlement checks
________ 12. Name and address for limited or general partnership investments
________ 13. Copies of promissory notes
________ 14. Copies of any IRA 401(k), pension or annuity statements *
________ 15. Copies of all vehicle registrations (car, boat, motor home, airplane)
________ 16. Copies of any leases
________ 17. List of decedent’s debts or debts the decedent was a guarantor or co-signor (include name and address of creditor)
________ 18. List funeral expenses
________ 19. List of any collectibles (i.e. artwork, coins, jewelry) owned by decedent
________ 20. Documentation for any other assets owned (i.e. royalty agreements, copyrights trademarks, patents, franchises)
________ 21. List of both heirs and beneficiaries that includes name, age, social security no., address, phone no. and relationship to decedent