Resource Center

Estate Administration Document Checklist

Practice Areas: Estates + Trusts

Tags:estate planning will probate

This checklist will help you prepare for our meeting relating to the initiation of the probate process. Your gathering of this information prior to an appointment is greatly appreciated. If the information is not available prior to our initial meeting, please provide it as soon as possible thereafter.

Estate Administration Document Checklist

ESTATE DOCUMENTS

- Original Will and Codicils.
- Copy of all Trust Agreements of which the decedent was a Trustee, Beneficiary or the Grantor. Provide addresses and phone numbers of Trustees and Beneficiaries.
- Certified Death Certificates. Provide two originals.
- Pre-nuptial and Post-nuptial Agreements.

INTERESTED PERSONS

- Provide address and phone number of Personal Representative.
- Provide name, address, Social Security Number and relationship of all beneficiaries named in the Will. If a Beneficiary is under age 18, please provide his or her age.
- Provide name, address and relationship of all persons who would inherit if there is no Will (e.g. spouse, children, or if none, parents, siblings, etc). If a person is under age of 18, please provide his or her age.
- Name and date-of-death of any deceased spouse and children of the decedent.
- Name, address and age of any children of a deceased child.

ASSETS OWNED INDIVIDUALLY

- Provide copies of bank statements for the month of death and a listing of checks (amount and payee) for all checks written prior to death but cleared the bank after the date of death.
- Provide copies of stock certificates and/or brokerage statements, mutual fund statements for the month of death
- Copies of deeds to all real property.
- Tangible Personal Property (e.g., automobiles - provide make, model, year, description).
- Copies of all business agreements (e.g., stockholder or partnership agreements) to which the decedent is a party.

JOINTLY OWNED ASSETS

- Provide joint owner's name, address, phone number and relationship to decedent.
- Provide copies of statements for the month of death.
- Provide copies of all deeds to real property.

ASSETS OWNED BY DECEDENT'S REVOCABLE TRUST

- Provide copies of all statements for the month of death for all assets owned by the decedent's trust.
- Provide copies of deeds to all real property.
- Copies of all business agreements to which the trust was a party.

DECEDENT'S 401(k), IRAs, ANNUITIES, LIFE INSURANCE

- Provide copies of statements for the month of death.
- Provide name, address and Social Security Number and relationship of all beneficiaries to the decedent.

DEBTS OF DECEDENT

- Individual Credit Card Debts. Provide copies of the most recent statement for each account.
- Medical Bills. Provide copies of all outstanding bills.
- Taxes. Provide copies of any correspondence from any tax authority regarding outstanding taxes and copies of the three

most recent tax returns that the decedent filed.

FUNERAL EXPENSES

- Provide copies of all funeral bills (e.g. funeral home, cemetery, flowers, etc.)
- Provide copies of receipts of any travel expenses of one person to accompany body to place of interment.

ADVISORS

- Provide name, address and telephone number of decedent's advisors (accountant, attorney, financial advisor, insurance advisor).