PROBATE ESTATE AND TRUST ADMINISTRATION
What Do I Bring To My Appointment?

1. Original Will / Trust / Estate Plan Documents.

2. As much information as is available describing decedent's assets and liabilities, such as bills, bank statements, investment reports, income tax returns, business records, real estate documents, the decedent's check register, and the life.

3. Names, addresses and dates of birth for the following:

   a. Specific persons (devisees) receiving a share under the Will / Trust;

   b. Decedent's spouse, if any, and surviving children and issue of deceased children, if any;

   c. If no surviving spouse, children, or grandchildren, decedent's surviving parents;

   d. If no surviving parents, the brothers and sisters of decedent and the children of deceased brothers and sisters.

4. Decedent's vital documents: birth certificate (if readily available), death certificate (3 or more depending on nature of assets), deeds, insurance policies, divorce judgments.

5. Social Security numbers of all who will receive property from the estate (if estate tax returns are required).

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