# 342 NORTH QUEEN STREET REAR



**LANCASTER, PENNSYLVANIA 17603**

**717-435-8271 | LDowd@lucydowdlaw.com**

**INFORMATION AND DOCUMENTS FOR ESTATE SETTLEMENT**

Please scan and upload the following documents to the folder shared with you in Clio, my secure office management software program:

1. Copy of the Will (and Codicils). You will need the **original Will** to submit to the Register of Wills;

2. Decedent’s federal and state income tax returns for the past three years;

3. Gift tax returns filed by decedent, if any;

4. Copies of most recent statements for all individual bank accounts of decedent;

5. Copies of most recent statements for all joint bank accounts of decedent;

6. Information regarding all stocks, bonds or other securities owned individually or jointly by decedent (list or copies of most recent brokerage account statement);

7. A copy of the death certificate. You will need to submit an **original death certificate** to the Register of Wills during probate;

8. Copy of the funeral bill;

9. Life insurance policies (whether or not on decedent’s own life) owned by decedent;

10. Last annual summary, if any, of death benefits provided by decedent’s employer;

11. Statement or summary, if any, of death benefits provided by prior employers of decedent;

12. Documents concerning prior divorce or separation of decedent;

13. Documents concerning armed services record of decedent;

14. Copies of any Will or Trust Agreement of which the decedent was a beneficiary;

15. Copies of any Will or Trust Agreement of which the decedent was a fiduciary, e.g. Executor, Administrator, Trustee.

16. Copies of any contracts, not completed prior to decedent’s death, to which the decedent was a party;

17. Copies of any Trust Agreement created by the decedent;

18. Most recent real estate tax bill for any real estate owned by decedent;

19. Copy of most recent mortgage statement, if any, for any real estate owned by decedent.;

20. Addresses of all beneficiaries named in Will and all of decedent’s living heirs, e.g. spouse, children, grandchildren of any predeceased children, including heirs not named in Will;