



ESTATE ADMINISTRATION – INFORMATION NEEDED

Please provide us with the following documents for your estate administration matter:

1. Copy of the Will (and Codicils) and please locate the original Will;
2. Copy of the death certificate, you will need an original death certificate for probate;
3. Copy of the funeral bill;
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 and copies of statements for all stocks, bonds or other securities owned individually or jointly by decedent;
7. Decedent's federal and state income tax returns for the past three years;
8. Gift tax returns filed by decedent, if any;
9. Copies of the most recent brokerage account statements;
10. Life insurance policies (whether or not on decedent's own life) owned by decedent;
11. Last annual summary, if any, of death benefits provided by decedent's employer;
12. Statement or summary, if any, of death benefits provided by prior employers of decedent;
13. Documents concerning prior divorce or separation of decedent;
14. Documents concerning armed services record of decedent;
15. Copies of any Will or Trust Agreement of which the decedent was a beneficiary;
16. Copies of any Will or Trust Agreement of which the decedent was a fiduciary, e.g. Executor, Administrator, Trustee.
17. Copies of any contracts, not completed prior to decedent's death, to which the decedent was a party;
18. Copies of any Trust Agreement created by the decedent;
19. Most recent real estate tax bill for any real estate owned by decedent;
20. Copy of most recent mortgage statement, if any, for any real estate owned by decedent; and
21. Addresses and email addresses of all beneficiaries named in Will and all of decedent's living heirs, e.g. spouse, children and grandchildren of any predeceased children.