



## Probate Checklist

### Items to Be Brought to the Initial Conference for Probating an Estate

- Original Will, if in your possession.
- Names, addresses, and social security numbers of the decedent, nearest relatives and all beneficiaries under the will. If any beneficiaries are minors, include their date of birth.
- If there is no Will, the names, addresses and social security numbers of the decedent's nearest relatives.
- List of all financial and bank accounts (checking, savings, certificates of deposit) that the decedent owned, including institution name, account numbers, how titled and any beneficiary or payable on death designation. If you do not have a chance to prepare such a list, please bring in the individual checkbooks, bankbooks or recent account statements.
- Title to all automobiles in the decedent's name (whether held individually or jointly).
- Original or copy of deeds or other documents showing the legal description of any real estate in which the decedent had an interest.
- Original or copy of the most recent property tax bills.
- Copy of decedent's last two year's federal and state income tax returns.
- Copies of the death certificate, if you have received these.
- If the decedent made any gifts for which gift tax returns were filed during life, copies of such gift tax returns.
- List of all life insurance policies, including insurance company, policy number, death benefit, face amount and beneficiary information, if known.
- If the decedent had an account with a stockbroker, the name and company of that broker, as well as contact information of broker. List of stocks, bonds, mutual funds.
- If the decedent was a member of any partnership or had any rights under an existing contract, a copy of such partnership agreement or contract.
- A list of the outstanding debts of the decedent of which you are aware.
- If the decedent received medical assistance, or had a spouse receiving or who had ever received medical assistance, the recipient's name, social security number, and when the recipient received medical assistance.