The following documents should be gathered and provided to our office prior to our meeting to discuss your family's estate and/or trust administration matter.

Document	Comments
☐ Original Will	
☐ Trust Agreements	
☐ Certified death certificate	
☐ Most recent statement for all bank, credit union, brokerage accounts and the following information	▪ Name and address of institution ▪ Account or contract number ▪ Account type (checking, savings, certificate of deposit, money market, high-yield account, savings bonds, stocks, bonds, mutual funds, Treasury Bills) ▪ Approximate date of death value ▪ Ownership type (was the account owned individually, jointly, by a trust or was it payable or transferable on death)

☐ IRA account information	▪ Name and address of institution
	▪ Account or contract number (copy of the adoption agreement and other contract paperwork when the IRA was established, if available)
	▪ Approximate date of death value
	▪ Beneficiary information:
	  ▪ Beneficiary's complete name
	  ▪ Address
	  ▪ Date of birth
	  ▪ Social Security number

☐ Life insurance information	▪ Name and address of insurer
	▪ Contract number
	▪ Approximate value of death proceeds
	▪ Beneficiary information:
	  ▪ Beneficiary's complete name
	  ▪ Address
	  ▪ Date of birth
	  ▪ Social Security number

☐ Real Estate deeds	▪ Copy of most recent recorded real estate deed for all real property. Examples include the following: ▪ Residence / home ▪ Rental property ▪ Vacant land ▪ Farm land ▪ Time-share interest ▪ Real estate located in other states
☐ Personal Property	▪ Examples include the following: ▪ Jewelry ▪ Guns ▪ Art ▪ Other collectables
☐ Motor vehicle title or registration for all vehicles owned	▪ Vehicles include automobiles, RVs, titled or registered items and watercraft
☐ "Other" asset information	▪ Examples include the following: ▪ Long-term care insurance ▪ Restricted Stock ▪ Performance Bonus payable ▪ Patents ▪ Trademarks ▪ Royalties ▪ Notes Receivable ▪ Mortgages Receivable ▪ Interest in a Trust ▪ Cash on hand
☐ Business interests	▪ Closely-held business interests (corporation, limited liability company, partnership, sole proprietorship, etc.) ▪ Attorney who represents the company ▪ Tax consultant information (accountant, CPA)
☐ Copies of all bills or debts due and owing	▪ Examples include the following: ▪ Utilities ▪ Mortgages ▪ Medical bills ▪ Most recent homeowner's insurance invoice ▪ Recent real estate tax invoice ▪ Credit card invoices ▪ Most recent motor vehicle insurance invoice ▪ Estimated tax payment coupons

☐ All checks received and uncashed at the time of the appointment	▪ Copies of all checks received and deposited after the decedent's date of death
☐ Location of any safe deposit boxes	
☐ Most recent federal tax filing with all supplementary and supporting documents	
☐ Contact information for professionals/advisors	▪ Examples include the following: ▪ Investment advisor ▪ CPA ▪ Attorneys (for business and/or personal)
☐ Copy of funeral invoice	
☐ Deed to burial plot or pre-paid funeral documents	

A family is invoiced for a staff member's preliminary review of the above documents and all office conferences at the attorney's hourly rate. Currently, our probate attorneys charge $300 per hour and paralegal's charge $175 per hour.

A family should expect an attorney's preliminary review of documents to take 1 – 2 hours.