ESTATE CHECKLIST

Documents to Bring to Initial Meeting

_________ Certified Death Certificates

_________ Paid in Full Funeral Bill

_________ Original Last Will & Testament

_________ Names and Addresses of all Heirs and social security numbers for all beneficiaries and date of birth for any beneficiaries under 18

_________ Copies of Deeds to any real estate owned solely or jointly

_________ Copies of titles to any cars owned solely or jointly with approximate mileage

_________ Statements that include date of death time frame (if statement not prepared yet, bring most recent) for any bank accounts held solely or jointly

_________ Statements for any IRA's or Keogh's owned that include date of death time frame (if statement not prepared yet, bring most recent) with beneficiary information

_________ Original Savings bonds owned jointly or solely

_________ Stock Certificates owned jointly or solely (if statement not prepared yet, bring most recent)

_________ Statements from investment companies that include date of death time frame (if statement not prepared yet, bring most recent)

_________ Pension Statement if continued after death with beneficiary information and amount of continuation (need beneficiaries date of birth)

_________ Information on partnership or business interest if applicable

_________ Life Insurance policies – with company name, policy number, face value, cash value and beneficiary information

_________ Copy of most recent tax return

_________ Any gifting information if gifted within last 3 years

_________ Did deceased or any beneficiary ever receive aid from the State of CT?

_________ Bring copies of any bills paid after death in deceased's name (i.e. medical bills, credit cards)

_________ Have client sign hard copy of SS-4 Application for Employer Identification Number (in file) – obtain executor's social security number

_________ Have client sign Authorizations for us to receive information (if not in file ahead of time – have paralegal prepare before client leaves). Have sign as many originals as there are assets