

<p><b><i>Please bring with you the following documents if applicable to Decedent.</i></b></p> <p><b><i>Please supply originals of requested documents if available.</i></b></p>	<p><i>Checklist</i></p>
<p><b>Decedent Information:</b></p> <ul style="list-style-type: none"> <li>Full Name of Decedent</li> <li>Date of Birth</li> <li>Date of Death</li> <li>Social Security Number</li> <li>Last Address</li> <li>County of Residence</li> </ul>	
<p>Obituary Copy</p>	
<p>Funeral Bill / Burial / Cemetery</p>	
<p>Death Certificate (order one for each asset)</p>	
<p>Last Will and Testament</p>	
<p>Trust Agreements</p>	
<p>Prenuptial or Post-Nuptial Agreements</p>	
<p>CD's, IRA's, 401K's, Checking, Savings, Money Market, and Brokerage Accounts</p> <ul style="list-style-type: none"> <li>- Provide last available statement near time of death</li> <li>- Provide Name and contact information for Brokers/Agents</li> </ul>	
<p>Policies of Life Insurance</p> <ul style="list-style-type: none"> <li>- Provide Original Policies if Available</li> <li>- Provide documentation if through employer</li> </ul>	
<p>Stocks</p> <ul style="list-style-type: none"> <li>- Provide Original Certificates and available statement near time of death</li> </ul>	
<p>Bonds</p> <ul style="list-style-type: none"> <li>- Provide Original Bond Certificates</li> </ul>	
<p>Real Estate Deeds (Residence of Decedent and/or Rental Properties Owned by Decedent)</p>	
<p>Real Estate Out of Town / Vacation Homes / Timeshares (Provide documentation/Deeds)</p>	

Income tax returns last 2 years	
Automobile Title(s)	
Boat, Camper, Trailer Title(s)	
Outstanding Bills in Decedent's Name (e.g. credit cards, utilities, mortgages, loans, etc.)	
List of Personal Property (jewelry, collections, antiques, household goods, cash on hand, etc.)	
Corporate, LLC or Partnership Information - This includes copies of the corporate charter or articles of organization and minutes; - A copy of the shareholder's agreement, operating agreement, or partnership agreement; and - Original stock or LLC certificates to transfer legal title.	
Business Licenses	
Contracts (i.e. loans, leases, employment, etc.)	
Lease Agreements (automobile, real estate, equipment)	

**Please provide the following information regarding Executor(s)/Trustee**

Executor and/or Trustee and/or Surviving Spouse Name Address Phone Email DOB SSN Relationship to Decedent	
Co-Executor and/or Trustee (If Applicable) Name Address Phone Email DOB SSN Relationship to Decedent	

**Please provide the following information for all heirs.**

Heir (please provide the following information for all heirs) Name Address Phone Email DOB SSN Relationship to Decedent	
Heir (please provide the following information for all heirs) Name Address Phone Email DOB SSN Relationship to Decedent	
Heir (please provide the following information for all heirs) Name Address Phone Email DOB SSN Relationship to Decedent	
Heir (please provide the following information for all heirs) Name Address Phone Email DOB SSN Relationship to Decedent	
Heir (please provide the following information for all heirs) Name Address Phone Email DOB SSN Relationship to Decedent	