

## INFORMATION AND DOCUMENTS NEEDED

### ***Please bring the following documents to our initial meeting:***

1. Originals of all wills and codicils.
2. Originals of all trusts and amendments established by decedent.
3. Most recent bank statements for accounts on which decedent's name appears as either sole or co-owner in any capacity.
4. All passbooks and savings certificates on which decedent's name appears.
5. Most recent statements for all mutual fund and stock brokerage accounts.
6. Certified copies of death certificate if available (3 copies).

*In addition, the following information and documents will also be needed, but need not be brought to the initial meeting:*

1. All IRA and qualified pension benefit documents, including beneficiary designation forms and plan descriptions.
2. Certificates of title ("pink slips") for all automobiles, recreational vehicles, boats, trailers, motorcycles, airplanes, etc., in which decedent had any ownership interest.
3. All life insurance policies and annuity contracts, including beneficiary designation forms.
4. All deeds to real property in which decedent had any interest.
5. All leases for all real property on which decedent was either the landlord or tenant.
6. Most recent personal income tax return.
7. Copies of all gift, estate, and/or generation-skipping transfer tax returns ever filed by the decedent or decedent's spouse at any time in the past.
8. Most recent financial statements and tax returns for any partnership or other closely held business.

9. Copies of any partnership agreements, buy-sell agreements, and corporate records for any partnership or closely held corporation.
10. A list of tangible personal property items that, individually or as a group or collection, have a fair market value in excess of \$3000 (e.g., jewelry, art, antiques, or coin, stamp, book, gun, or wine collections).
11. Copies of all bills for expenses of last illness, such as hospital and doctor bills, and an itemized list of all funeral and related expenses.
12. A list of any known debts, liabilities, pending lawsuits, or other claims of or against decedent.
13. Copies of any trust of which decedent was a trustee or beneficiary at the time of death.
14. A list of all safe deposit boxes on which decedent's name appears, by bank and branch, and an inventory of the contents of each.
15. All deeds of trust, notes, or accounts receivable representing payments owed to decedent.
16. All stock certificates, bonds, or other securities.
17. Any other documents that you believe may be important to my understanding of the decedent's personal and financial affairs.