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ESTATE ADMINISTRATION CHECKLIST

When coming in for the Estate Administration, please bring with you the following:

1) ORIGINAL LAST WILL AND TESTAMENT and any codicils that have been executed. Copy of any TRUST AGREEMENTS that have been signed by the decedent.

2) CERTIFIED COPY of the death certificate.

3) Copy of the FUNERAL BILL and information on related expenses.

4) BANK ACCOUNTS: Copies of bankbooks, statements of all bank accounts which indicate the value of the account and how the account was held (i.e. the decedent's name only, jointly with someone else, and/or in trust for someone else.)

5) SAFE DEPOSIT BOX: Name and address of institution where safe deposit box is located. Account number and title of safe deposit box.

6) REAL ESTATE: Original or copy of the most recent deed (or certificate if cooperative apartment) or other evidence of ownership. Statement of amount of mortgage outstanding. If available, please also bring letter of appraisal.

7) STOCKS AND BONDS: Evidence of ownership (certificates and/or statements), number of shares or units owned. Present and date of death value.

8) INSURANCE ON THE DECEDENT'S LIFE: Evidence of ownership and beneficiary designations, name of insurance company, type of insurance, policy number, present and date of death value.

9) ANNUITIES: Evidence of ownership and date of death value, ownership and beneficiary designations, name of company, type of annuity and present and date of death value.

10) PERSONAL PROPERTY: Evidence of ownership and date of death value of any automobiles, jewelry, artwork or other valuable personal property owned by the decedent at the date of death.

11) DEBTS: Evidence of all outstanding debts of the estate, including expenses of the last illness of the decedent, outstanding taxes and/or liens, and outstanding bills such as credit card balances, utility bills, etc.

12) TAX RETURNS: Copy of last income tax and gift tax return.

13) FAMILY TREE

Please also complete the following:

1. ***Name, address, Social Security and telephone number of Executor/Executrix. State relationship to the decedent, if any.***

2. ***Social Security Number of decedent.***

3. ***Social Security Number of the decedent's partner/spouse.***

4. ***Name(s) and address(es) of all beneficiaries under the Will (if applicable):***

5. ***Name(s) and address(es) of all persons who would constitute decedent's distributes (close family members, parents, siblings, children and grandchildren of the decedent). Please include ages if not adults.***

6. ***Social Security Number of Executor or Executrix.***