Gudorf Law Group, LLC
board certified in estate planning

Items to Bring for Probate/Trust Administration

1. Non-Financial Documents

- Identification – picture ID (driver's license, state ID, if no picture ID, then something with decedent's name)
- Social Security card(s)
- Birth verification (birth certificate, baptismal certificate or school record with date of birth)
- Marriage certificate or death certificate/divorce decree of spouse
- Health Insurance Identification Card (for all insurance coverage including Medicare, Medicare Supplemental, etc.)
- Names, addresses, phone numbers and social security numbers of all children
- Listing of assets sold or given away in the last five years
- Death certificate of decedent (one original)

2. Legal Documents

- Most recent Will
- Trust documents
- Business entity/partnership agreements
- Prenuptial Agreements
- Gift tax returns

3. Non-Liquid Assets

- Deeds, land contracts, property agreements for all real estate
- Titles to all vehicles, motor crafts, jet skis and trailers
- Stock certificates
- Savings bonds
- Promissory notes or loans (owed to decedent)

4. Liquid Assets (for all current accounts)

- Bank and credit union statements (checking, savings, CDs, money market, etc.)
- IRA/401(k) account statements
- Brokerage account statements
- Checkbook register and savings passbooks

5. Insurance and Annuities

- All life insurance policies (including annual statements)
- Annuity contracts (annual/quarterly statements)
- Long-term care, cancer and accidental death policies

6. Income and Expenses

- Income tax returns and 1099s for the last 2 years
- Last illness expenses
- Funeral and cemetery expenses
- Home/car insurance statement

7. Debt Information

- Mortgage statement
- Credit card statements
- Loan documents

Please separate these items into 7 folders and bring to our office.