



## 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 proposed decedent's name)
- Social Security card(s)
- Health Insurance Identification Card (for all insurance coverage including Medicare, Medicare Supplement, HSA, etc.)
- Names, addresses, phone numbers and email addresses of spouse and all children and other beneficiaries
- 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)
- Most recent real estate tax bill

### 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 and information for current year
- Last illness expenses
- Funeral and cemetery expenses
- Home/car insurance statement

### 7. Debt Information

- Mortgage statement
- Credit card statements
- Loan documents



***To make the most efficient use of our time together it is especially important that you upload your documents to your client portal in the corresponding folders. A link will be provided to you by email 3-4 days prior to your scheduled appointment. If you need to bring us hard copies, please make sure they are copies and not originals, of the above documentation and separate these items into seven (7) folders and bring to our office.***