<u>ITEMS NEEDED FOR **ESTATE ADMINISTRATION** CONSULTATION</u>

Please bring the following items/information to your consultation:

- **Original** Last Will and Testament (if you do not have the original, please bring a copy)
- **Original** Death Certificates (please bring as many as you have)
- Deeds to all real estate
- Current statement(s) from life insurance policies showing face value, death benefit, and cash surrender value
  - Names of beneficiaries (if any)
- Current statement(s) from all bank accounts, money market accounts, CDs, investment/brokerage accounts, and annuities
  - Names and addresses of owners and beneficiaries (if any)
- Current statement(s) for all IRAs, 401(k) accounts, deferred compensation accounts, and any other retirement accounts
  - Names and addresses of beneficiaries (if any)
- Current value of all stock (including number of shares)
  - Please bring all stock certificates (if any)
- **Original** U.S. savings bonds
  - Address for any joint bond owners
  - Date of death (and death certificate, if possible) for any deceased joint bond owners
- Copies of all vehicle titles + make, model, year, mileage and condition
- Location of safe deposit box (if any)
- Funeral bill + list of all other funeral related expenses (dinner, flowers)
- Current credit card statement(s)
- List of debts – mortgage, real estate taxes, home/car insurance, car loan, medical bills, utility bills, nursing home
  - Please bring current statements for all debts, if possible
- Executor/Administrator's name, address, phone number, e-mail address, and Social Security Number
- All children's names (with middle initial), addresses and phone numbers – **this includes children not listed in a Will**
- Names (with middle initial), addresses and phone numbers for any other person who is or may be a beneficiary of the estate