

DOCUMENTS NEEDED FOR PROBATE CASE

1. Original Death Certificate of Decedent.
2. If applicable, original Will and Trust of Decedent.
2. List of full names, addresses and relationship of all heirs. Heirs should include:
 - Anyone named in the Will or Trust of Decedent
 - Spouse and children of decedent. If a child is deceased, list the lineal descendants of deceased child (ie grandchildren)
 - If no spouse or children, then parents, siblings and nieces or nephews of decedent
4. Asset List of Decedent. Asset list should include a list of all assets owned by decedent in whole or in part, their accompanying account numbers, if applicable, their location, and related documents as described below. If any asset is to be distributed to individuals outside probate, list the named beneficiaries. The below list is not inclusive, check with Decedent's accountant, financial planner, employer and check mail to locate all assets.
 - Decedent's home: provide copy of deed to home and estimated value. If decedent rented home provided copy of lease.
 - Real estate: provide copy of deed to any other real estate and estimated value. This includes lake homes, farm land, other investment real estate, mineral rights, and time shares.
 - Motor Vehicles: list of all motor vehicles with year, make, model, VIN# and estimated value. Provide a copy of titles.
 - Bank Accounts – list name and address of bank and account number for each checking and savings bank account as well as balance of each account. Provide copy of most recent statement for each account.
 - Investment accounts-list name and address of where each investment account is held, account number and balance of account. Provide copy of most recent statement for each account.
 - IRA and 401K Accounts: list name and address of holder of the account, account number, and balance of account. Provide copy of most recent statement for each account.
 - Life Insurance – list name and address of life insurance company, value of policy and any named beneficiaries. Provide copy of policy cover sheet which gives policy number.
 - Negotiable instruments including any uncashed checks, notes/loans payable to decedent: list item and value of instrument. Provide a copy of any check or loan document or any other related document.
 - Assets that are held in another estate payable to decedent: list any estate that decedent is a beneficiary and currently due to receive assets.
 - Businesses: If decedent owned any business in whole or in part, list the business and its address, ownership structure of business (sole proprietorship, partnership, LLC, corporation), percentage of ownership, whether business is currently operating, list assets and liabilities of business. Provide previous two years of financials for the business.
 - Personal Property such as, jewelry, household furniture and equipment, china, silver, linens, art, coins, stamps, and other tangible personal property. Inventory, collect and secure all decedents personal property. List all items, their location

and estimated value. If necessary, arrange appraisals for items of significant value.

5. Liability list of Decedent. List all Decedent's liabilities/debts/outstanding bills. Include the name and address of creditor as well as amount owed. Provide copy of most recent bills. The below list is not inclusive of the possible liabilities. Continue to check Decedent's mail for information on liabilities. If a liability has been paid after the date of decedent's death, indicate who paid the liability on the list.
 - Funeral expenses
 - Medical bills
 - Mortgage statements, list if Decedent had a reverse mortgage
 - Unpaid rent
 - Motor vehicle loans
 - Credit cards
 - Utilities
 - Other outstanding loans

6. Taxes: Provide copies of any filed tax returns for the last 1-3 years. List any unpaid taxes for decedent.