ESTATE OR TRUST SETTLEMENT LIST

The person who is nominated as personal representative of a decedent's estate, or the person who is a successor trustee of a decedent's trust, or the person who will assume responsibility for settling a decedent's estate when there is no Will should bring the following information and documents to their first appointment at our office,
if possible:

1. Original Will and/or Trust Agreement

2. Current mailing addresses for all persons who will inherit or who will receive any distributions

3. Original funeral bill (if available)

4. Original death certificate (if available)

5. The most recent statements for any accounts, deposits, investments, individual retirement accounts, retirement plans, and annuities

6. All deeds to any real estate and the most recent property tax statements

7. Information about any pension that is being paid, including the phone number to contact the plan administrator

8. Life insurance policies and most recent life insurance policy statements

9. The last three (3) years of income tax returns

10. Bills that are owed, including loans and credit cards