

ESTATE ADMINISTRATION INFORMATION

(Please bring the following documents with you to your scheduled appointment, if available)

DOCUMENTS TO LOCATE AND BRING WITH YOU

1. All Signed Copies of Wills and Codicils.
2. A copy of decedent's death certificate.
3. Deeds to all real estate owned by decedent, including vacation homes and mountain land.
4. Original bonds, including Series E and Series H bonds.
5. Original stock certificates owned or registered in the name of decedent.
6. Most recent monthly statements for each bank, savings and loan, or credit union, checking or savings account.
7. All insurance policies.
8. Annuities and royalties, including oil and gas royalties, owned by or paid to decedent.
9. Titles to all automobiles, boats, airplanes, and other motor vehicles registered in the name of the decedent.
10. Copies of funeral bills.
11. Documents regarding family status; divorce decree, court orders, etc.
12. Name, address and age of all children ever born to or adopted by decedent.
13. Name and address of each bank.
14. Name, address and phone number of decedent's accountants and other agents.