



2.

List the legal description(s) with street address(es) if any, and approximate value(s) of all real property owned by decedent. Include the type of property (residential, vacant land, commercial, farm land etc.), (if possible, provide a written appraisal). If property is leased, provide copies of all leases. State whether the property was owned solely, in joint tenancy or in tenants-in-common and who the other owner(s) is/are. Provide copies of all deeds if possible.

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3.

List any mineral rights, water rights, and oil and gas rights owned by the decedent, and provided information with regard to any annual royalty payments for the past three years. Also, provided copies of any oil and gas leases.

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4.

List all stocks and bonds owned by the decedent and provided copies of all stock certificates, bonds, mutual funds and any other securities owned by the decedent. State whether owned solely or in joint tenancy and who joint owner is.

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5.

List all financial institutions and account numbers where decedent had accounts, including, checking, savings, money market, and certificates of deposit, and provide bank statements for the last two years, if possible. State for each, whether the account was owned solely by decedent or in joint tenancy and who the joint owner is.

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6.

List all companies, including account or policy numbers, where the decedent had individual retirement accounts, annuities, pensions, and life insurance policies, and the beneficiaries, if any, of each. Provide copies of documentation for these items, and Form 712 (Life Insurance Statement) for each life insurance policy.

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7.

List the year, make, and VIN of all automobiles owned by the decedent, either individually or in joint tenancy. Include approximate cash value of each vehicle, and copies of titles.

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8.

Did the decedent own any jewelry, coin collections, antiques or other personal items of value? If so, list the items and their approximate values.

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9.

Provide a total value (excluding those items listed above) of all household goods and personal property owned by the decedent.

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10.

Did the decedent have a safe deposit box? If so, state the location and whether the safe deposit box was owned individually or jointly, and who the joint owner is. In addition, provide a list of the contents of the safe deposit box.

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11.

Was the decedent owed any money which was earned as of date of death but not paid, such as salary, commissions, bonuses or governmental payments? List amounts and who is owing.

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12.

Did the decedent make any gifts or other transfers of assets for less than full or adequate consideration? If so, provide the names of recipients, dates of gifts or transfers, and value of gift or transfer.

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13.

Was the decedent receiving any payments from an agreement or contract for sale of real property? If so, provide a copy of the contract along with an amortization schedule showing remaining principal amount and accrued interest due as of decedent's date of death.

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14.

Did the decedent possess or own any interest in a partnership, limited partnership, limited liability company, unincorporated business, or stock in a closely held business? If so, provide the fair market value and copies of any and all partnership agreements, operating agreements, tax returns, corporate books, and buy/sell agreements.

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15.

Was the decedent owed money by any individuals under any promissory notes? If so, list from whom and the amount owed.

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16.

Did the decedent possess or release any general powers of appointment? List all estate the decedent had inherited property or would have inherited property within one year prior or after the decedent's death.

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17.

Had the decedent executed any pre-nuptial or post nuptial agreement? If so, provide a complete copy of the document.

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18.

Did the decedent create a trust during his lifetime, or was the decedent serving as trustee of any trust agreement? If so please provide a complete copy of the trust agreement.

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19.

List all debts owed by the decedent or bills due as of the decedent's date of death. List any debt or note that the decedent personally guaranteed.

## **Documents To Bring With You To Your Initial Session**

**Estate Planning Documents:** *Last Will and Testament; Codicils, Trust Agreement of deceased person (Originals if available)*

**Court Pleading & Filings:** *Copies of all pleading, reports or other documents filed with the Court or drafts that have been prepared, but not yet filed with the Court.*

**Death Certificate** *(Original if available)*

**Names & Address List:** *Names, Addresses, Phone Numbers of all family members or beneficiaries named in the Will.*

**Disposition Expenses:** *copy of the statement for funeral services and burial costs or cremation*

**Taxes:** *Copies of personal income tax returns for the past 3 years and copies of all gift tax returns filed by the decedent*

**Asset List and Statements of Value as of Date of Death:** *Checking Accounts, Savings Account, Certificate of Deposit, Bonds & Stocks, Investment Accounts, Money Market Accounts, Retirement Accounts & Pensions, Mineral Rights, Oil & Gas Rights, Insurance Policies (Life, Burial, Long-term Care), Vehicles (Cars, Boats, etc.)*

**Deeds to Real Property:** *Primary residence, rental/investment property, commercial property, vacant land, and agricultural land*

***It is appreciated if you bring copies for us to keep of all the documents you gather, but this is not necessary. However, if we need to spend time making copies during your appointment, it takes away from the time we have to spend with you analyzing the case.***