Philip M. Hawes • Attorney

PROBATE CHECKLIST

This is a general questionnaire and checklist setting forth information and steps that are typically needed to administer an estate in probate court. Some of these items may not pertain to your situation. Please provide copies of any documents requested, and answer any questions below as best you can in the space provided or in an attachment.

Name of the decedent (including aka used)	
Date of death	
Social Security number	
Last known address	
Place of death (including County)	

Names and addresses of the decedent's relatives to the second degree (spouse, parents, children, grandchildren). If none, please provide names and address of brothers and sisters or children of predeceased brothers and sisters, and dates of birth for any minors.

Names and addresses of all persons and/or entities named in the decedent's Will, Codicils and Trusts.

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Name and address of decedent's accountant

Name and address of decedent's tax return preparer

List each life insurance policy owned by the decedent that you have located: Name of insurance company, name of policy holder (owner), face amount of policy, policy number, and known beneficiaries

List any employee benefits of the decedent at the time of death

DECEDENT'S BUSINESS: List registered name, any dba, address of business, type of business (sole proprietorship, corporation, partnership, etc., any state registration numbers assigned (e.g., corporation number) location of business records, name and phone numbers for persons to contact to review business records and bookkeeping.

PERSONAL REPRESENTATIVE INFORMATION

Name, address and phone number

Relationship to decedent

Date of birth

Driver's license number and expiration date

Is there any reason why you are not bondable?

INITIAL INFORMATION AND DOCUMENTS NEEDED

- ☐ Obtain original of all Wills, Codicils and Trust, if known
- ☐ Certified copy of death certificate

ESTATE INVENTORY: We will assemble an inventory of what the decedent owned at the time of death, including documentation of how the decedent's name appears on the title document to assets. [There is no need to list the decedent's household furniture, furnishings, books, works of art, collections, and other personal effects, except personal items that the Will or Trust instructs to be given to specific persons.]

ASSET INFORMATION YOU SHOULD LOOK FOR

- ☐ Copy of deed to each real property where decedent is named on title
- ☐ Copies of latest real property tax bills

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☐ Copies of all account statements including the date of death from each bank, savings and loan, credit union, brokerage account, and any other financial account in the decedent's name alone or with anyone else.

☐ Copy of title documents (pink slips) and current proof of insurance for each vehicle owned by the decedent.

☐ Copy of any promissory notes and document securing the obligations, such as a deed of trust, personal property security filing, etc.

☐ Copies of the latest income tax returns filed by or for the decedent.

NOTE ANY OTHER DOCUMENTS OR INFORMATION YOU THINK SHOULD BE BROUGHT TO MY ATTENTION AND ANY QUESTIONS YOU MAY HAVE

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