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DOCUMENT CHECKLIST

For your convenience, this checklist is provided listing the types of documents you will need to bring to the "Gathering the Estate" meeting. It is important that we receive the documents listed below at OR before your "Gathering the Estate" meeting. **(√)**

Client intake form, if you have not already provided this information, please complete as much as possible	
Certified death certificates (bring at least five (5))	
Last will & testament of deceased (bring original)	
Any & all codicils to the last will & testament of deceased (bring originals)	
Trust(s) (bring originals)	
Any & all amendments to trust(s) (bring originals)	
Tax returns:(bring last 2 years) 1) State and Federal 2) Gift tax returns	
Real estate information- for each real property: 1) Most recent deed 2) Recent property tax bill examples: primary residence, rental properties, time share properties	

Please also bring with you the following information to your appointment. Again, it is very important that you bring these documents with you. Copies will be okay unless originals are requested. **(√)**

We will need the Statements of Account (as close to the date of death as possible) for the following assets:	
Bank Accounts: checking, savings, CD, money market	
Documentation for any Safe Deposit Boxes	
Investment Accounts: Copies of most recent statements	
Stocks/Bonds	
Personal Effects	
Retirement Plans: IRA, 401(K), SEP	
Pension Plans	
Insurances Policies	
Annuities	
Monies Owed to Decedent	
Business and Professional Interests	
Oil, Gas, Mineral, Water, Royalty Interests	
Real Estate:	

Please attempt to bring originals of the above listed documents to the "Gathering the Estate" meeting. Our office will make copies of all documentation during the meeting and provide you with the originals in your Estate Administration Binder.