

TYPICAL INFORMATION AND ITEMS NEEDED FOR ADMINISTRATION OF AN ESTATE OR TRUST:

Please note that this is intended as a general checklist. Some of the information may be necessary for probate administration. Other information may relate only to the transfer of non-probate property or to tax return requirements and may not pertain to probate property. Please review the list carefully, since property may be subject to reporting for tax purposes even though there may be no estate or income tax due, and regardless of whether the reportable property passes outside the probate administrative process. Because this is a general list, some items may not be applicable to your particular situation.

1. Original Will (to be submitted to the Probate Court), if one exists. If you believe there is a Will, but you cannot find the original, a photocopy may suffice if the original cannot be found (but the process to have a copy admitted to probate is significantly more burdensome).
2. Certified Death Certificate (very little can be started until that is available).
3. Names, addresses, phone numbers, e-mail addresses (if available), and dates of birth of next of kin (which would typically include spouse, children, and grandchildren by any deceased child), and also for any other people or organizations named as beneficiaries in a Will.
4. Social security numbers of beneficiaries of the estate, if readily available (may be needed for fiduciary income tax returns later in the administrative process).
5. Most recent income tax return of the decedent, and contact information for the tax return preparer.
6. Gift tax returns of the decedent, if any, and information concerning any gifts made by the decedent within 3 years preceding death (whether or not exceeding the annual gift exclusion amount) including the date of the gift, the property transferred, the recipient, and the estimated value at the date of the gift (such as accounts closed out and transferred to others).
7. Copy of deeds to any real estate in which the decedent had an interest; most recent real estate tax bill for each parcel (some of this information may be available to us online); and mortgage loan information for each parcel. I would also recommend you confirm that homeowner's insurance coverage is in effect.
8. Any stocks, bonds or other securities held by the decedent alone or jointly with others (bring in photocopies or the original securities and we will make photocopies) or security account statements if the securities are held by a broker or in a dividend reinvestment plan.
9. Any financial deposit accounts including demand or time deposits, CD's, etc., whether in the name of the decedent alone, or jointly with others. Please provide account statements starting with 1 month preceding the month of death to 2 months after.