

10. Any annuities or non-qualified/tax-deferred annuities held individually or jointly. Please provide the most current statement available and any available beneficiary information.
11. Life insurance policies and/or vouchers for life insurance proceeds already received (insurance may or may not be includable for estate tax purposes and may affect deduction amounts).
12. Information concerning personal property specifically mentioned in the Will, if any, and any other personal property of significant or unusual value such as antiques, coins, stamps or other fine art collections; and any personal property riders attached to the decedent's property insurance coverage.
13. All certificates of title for motor vehicles, boats, trailers, etc. in the decedent's name alone or jointly with others.
14. Information on any bank safe deposit box in the name of the decedent alone or jointly with others, including the box number and the address and phone number of the bank branch office where the box is located. If a safety deposit box has already been inventoried, or you know what property it contains, please bring that inventory with you.
15. Any information concerning closely held corporations or partnerships in which the decedent was involved, including buy-sell agreements or partnership agreements and most recent financial statements for such entities.
16. Trust documents or any information pertaining to trusts or other assets from which the decedent was receiving income or other benefits.
17. Any pension or retirement benefit information including IRAs, Keogh plans, qualified pension plans, or death benefits payable through current or former employers or privately.
18. Promissory Notes, Mortgage debts, or Land Contract balances owed to the decedent by others.
19. Any debts owed including loans, mortgages, revolving credit accounts, outstanding utility bills, and unpaid medical expenses.
20. Invoices, receipts, cancelled checks and information concerning any debts or expenses incurred or paid on behalf of the estate; however, I would suggest not paying any debts or expenses until we meet and review them to determine liability and priority of claims, particularly if most property will pass outside the probate administrative process.
21. Invoices or paid receipts pertaining to Funeral bill, headstone, grave purchase or opening, including pre-need or prepaid funeral information (a paid funeral bill will be required by the Probate Court).

It is often wise to refrain from making transfers of property and paying any bills until the overall financial situation is determined because sometimes there are opportunities for disclaimers or other elections that may have tax advantages or disadvantages for the beneficiaries or family.