ESTATE CHECKLIST
FOR PROBATE OR ADMINISTRATION OF TRUST

A. Documents

1. Copy of decedent's death certificate
2. All signed copies of the decedent's wills and codicils
3. Account books, passbooks, and certificates of deposit (after preparation of descriptive lists in "B", below); most recent monthly statement for all accounts
4. Deeds to all real property owned by decedent and his or her spouse, documents relating to condominiums, appraisals, property tax receipts, title policies
5. Automobile ownership certificates (pink slips); titles to boats, airplanes, and other vehicles registered in name of decedent or decedent's spouse
6. Loan documents for debts owed to decedent or decedent's spouse including copies of notes, liens, and mortgages
7. Documents showing any death or retirement benefits with decedent's employer
8. Original bonds including Series E bonds, original stock certificates owned or registered in the name of decedent or decedent's spouse, alone or in combination with others. If securities held in a brokerage account, most recent statement of account
9. Pensions, profit sharing plans, patents, copyrights, judgments, division orders, and royalties, including oil and gas royalties, owned by or paid to decedent or decedent's spouse; financial statements related to such items
10. Loan documents for debts owed by decedent or decedent's spouse, including payment books and copies of notes, liens, and mortgages
11. Partnership, "buy-sell," employment, franchise stock purchase, stock option, lease, and other agreements signed by decedent or decedent's spouse.
12. Annuities and life, accident, disability, and health insurance policies for which decedent or his spouse are owner, beneficiary, or insured
13. Property (fire, theft, etc.) and liability insurance policies
14. Trust instruments created by or for the benefit of decedent or his or her spouse; financial statements for each trust
15. State and federal income tax returns filed by decedent and his or her spouse for past five years
16. All state and federal gift tax returns ever filed by decedent and his or her spouse

B. Information

1. Location and number of safe deposit box
2. Amount and location of cash other than cash in banks
3. Balance of all bank accounts and certificates of deposit in name of decedent or decedent's spouse, name in which account stands, name and location of institutions, whether accounts are commercial or savings accounts, account numbers
4. Checks payable to decedent at time of death
5. Receivables due decedent unpaid at time of death, including unpaid compensation for services, unpaid workers' compensation benefits, and reimbursement owed from insurer for medical expenses paid by decedent; name and address of debtors
6. List and estimated value of decedent's jewelry
7. List and estimated value of decedent's furniture, livestock, equipment, and personal effects
8. Balance and information concerning brokerage accounts
9. Detailed list of stocks and bonds including number of shares or bonds, class of stock (common, capital, preferred, etc.), stock certificate numbers and name or names in which registered, serial number of bonds, whether bearer or registered, and if registered, exact name or names in which registered
10. List of United States bonds with purchase date, name or names of owners, value and number of each bond
11. Club memberships
12. List of estates of which decedent was a beneficiary and whether distributed
13. All gifts made by and received by decedent at any time in his or her lifetime
14. Decedent's outstanding checks

15. Debts of decedent unpaid at time of death, including charge or credit card purchases made but not yet billed, funeral expenses, and expenses of last illness; names and addresses of creditors
16. Fiduciary capacity of decedent (trustee, guardian, executor, administrator)
17. Names and addresses of all entities co-owning real property with decedent
18. Date and place of marriage to, and name, address, age, and social security number of decedent's surviving spouse