What to Bring Your First Appointment

ESTATES

1. Original Last Will and Testament, or at least a copy, as well as a copy of any Trust;

2. **Certified** copies of Death Certificate;

3. If spouse is deceased – copy of death certificate;

4. Name and mailing address of spouse, children, and children of any predeceased child of the decedent and, if there is no spouse, children or grandchildren, then the name and address of all brothers and sisters of the decedent who were alive on decedent's date of death and the children of any predeceased brothers and sisters. If any such heir or beneficiary is under 18 years of age, include date of birth, name of parents who the minor resides with, and whether there is a Court Appointed Guardian. Copy of Death Certificate for any heir and/or beneficiary;

5. List of Assets: **(a)** Name of Bank including Branch), Name on Account, Account Number, and approximate balance in account; **(b)** Original life insurance policy or name of company, Policy Number, and name of beneficiary; (c) If stock, name of broker, account number and latest monthly statement; **(d)** Savings Bonds - bring original bonds or list of bonds, including date of bond, face value of bond, Serial Number and names on bonds; (e) Deed and current tax receipts to all real estate owned; **(f)** Certificate of Title to any registered vehicle (car, boat, motorcycle, truck, camper, all-terrain vehicle, etc.); **(g)** Retirement Benefit information (Retirement Number and who to contact); **(h)** if Veteran, VA number; and **(I)** description of any other asset that contains decedent's name, either alone or jointly with another;

6. Copy of Funeral Bill;

7. Any other information you think may be helpful.