

**PLEASE BRING THE FOLLOWING WITH YOU TO YOUR APPOINTMENT**  
**(IF APPLICABLE)**

**PROBATE CHECKLIST**

- \_\_\_\_\_ Original Will and Codicil (if any).
- \_\_\_\_\_ Copies of Trusts (if any).
- \_\_\_\_\_ Death Certificate.
- \_\_\_\_\_ Copy of paid funeral bill.
- \_\_\_\_\_ Deeds for Real Estate.
- \_\_\_\_\_ Title to any motor vehicles, boats, trailers.
- \_\_\_\_\_ **Names, social security numbers and addresses of all beneficiaries under the will and their relationship to the deceased.** A date of birth is required for any minors listed.
- \_\_\_\_\_ Family Tree (names and address of next of kin).
- \_\_\_\_\_ Any Safe Deposit Information.
- \_\_\_\_\_ Form 712 Life Insurance Statement (if Life Insurance has already been claimed).

**QUESTIONS**

- |  |       |       |
|--|-------|-------|
| Did the decedent have a safe deposit box<br>Location, Name on Box  | _____ | _____ |
|  | YES   | NO    |
| Did the decedent make gifts or transfers<br>within the last five (5) years                               | _____ | _____ |
|  | YES   | NO    |
| Did the decedent own valuable antiques,<br>art, jewelry, coins or stamp collections                      | _____ | _____ |
|  | YES   | NO    |
| Is the surviving spouse a U.S. Citizen,<br>(give date of naturalization), and<br>Date of birth of spouse | _____ | _____ |
|  | YES   | NO    |

**PLEASE COMPLETE THE ATTACHED LIST AND BRING  
IT TO YOUR APPOINTMENT**

**ASSET INFORMATION**

**A. REAL ESTATE** – Please bring warranty deeds and latest mortgage statement.

1. \_\_\_\_\_  
Location \_\_\_\_\_  
Rental Income
- \_\_\_\_\_
- Name(s) on Deed
- \_\_\_\_\_
- Mortgage/Name(s) on Mortgage \_\_\_\_\_  
Balance/Bank/Acct. #
2. \_\_\_\_\_  
Location \_\_\_\_\_  
Rental Income
- \_\_\_\_\_
- Name(s) on Deed
- \_\_\_\_\_
- Mortgage/Name(s) on Mortgage \_\_\_\_\_  
Balance/Bank/Acct. #

**B. BROKERAGE ACCOUNTS, BONDS, and SECURITIES**

**Brokerage Accounts:**

1. \_\_\_\_\_  
Financial Institution \_\_\_\_\_  
Name(s) on Account
- \_\_\_\_\_
- Account # \_\_\_\_\_  
DOD Value
2. \_\_\_\_\_  
Financial Institution \_\_\_\_\_  
Name(s) on Account
- \_\_\_\_\_
- Account # \_\_\_\_\_  
DOD Value

**Brokerage Accounts Con't**

3. \_\_\_\_\_  
Financial Institution  
Name(s) on Account  
\_\_\_\_\_  
Account #  
DOD Value  
\_\_\_\_\_

**Bonds:**

1. \_\_\_\_\_  
# of Bonds and Series (E, EE, H)  
Name(s) on Bond  
\_\_\_\_\_  
Issue Date  
Face Amount  
\_\_\_\_\_

2. \_\_\_\_\_  
# of Bonds and Series (E, EE, H)  
Name(s) on Bond  
\_\_\_\_\_  
Issue Date  
Face Amount  
\_\_\_\_\_

**Securities/Stock (Not in Brokerage Account)**

1. \_\_\_\_\_  
Name of Stock # of Shares Name(s) on Stock  
\_\_\_\_\_  
Transfer Agent Account # Dividends reinvested  
\_\_\_\_\_

2. \_\_\_\_\_  
Name of Stock # of Shares Name(s) on Stock  
\_\_\_\_\_  
Transfer Agent Account # Dividends reinvested  
\_\_\_\_\_

3. \_\_\_\_\_  
Name of Stock # of Shares Name(s) on Stock  
\_\_\_\_\_  
Transfer Agent Account # Dividends reinvested  
\_\_\_\_\_

**C. BANK ACCOUNTS**

1. \_\_\_\_\_  
Financial Institution  
\_\_\_\_\_ Name(s) on Account  
Account # \_\_\_\_\_  
DOD Value \_\_\_\_\_
  
2. \_\_\_\_\_  
Financial Institution  
\_\_\_\_\_ Name(s) on Account  
Account # \_\_\_\_\_  
DOD Value \_\_\_\_\_
  
3. \_\_\_\_\_  
Financial Institution  
\_\_\_\_\_ Name(s) on Account  
Account # \_\_\_\_\_  
DOD Value \_\_\_\_\_

**D. AUTOMOBILE(S), BOAT(S), TRAILER(S):**

1. \_\_\_\_\_  
Year, Make & Model  
\_\_\_\_\_ Name(s) on Title  
VIN Number \_\_\_\_\_
  
2. \_\_\_\_\_  
Year, Make & Model  
\_\_\_\_\_ Name(s) on Title  
VIN Number \_\_\_\_\_

**E. ANNUITIES, IRAS, & PENSIONS**

**Annuities**

1. \_\_\_\_\_  
Company Account/Policy Number  
  
\_\_\_\_\_  
Beneficiary DOD Value/Benefit
2. \_\_\_\_\_  
Company Account/Policy Number  
  
\_\_\_\_\_  
Beneficiary DOD Value/Benefit
3. \_\_\_\_\_  
Company Account/Policy Number  
  
\_\_\_\_\_  
Beneficiary DOD Value/Benefit

**IRA'S/Pension Benefits**

1. \_\_\_\_\_  
Bank/Financial Institution Account Number  
  
\_\_\_\_\_  
Beneficiary DOD Value/Benefit
2. \_\_\_\_\_  
Bank/Financial Institution Account Number  
  
\_\_\_\_\_  
Beneficiary DOD Value/Benefit
3. \_\_\_\_\_  
Bank/Financial Institution Account Number  
  
\_\_\_\_\_  
Beneficiary DOD Value/Benefit

**IRA's/Pension Benefits Con't**

4. \_\_\_\_\_ Account Number  
Bank/Financial Institution  
\_\_\_\_\_  
Beneficiary DOD Value/Benefit

**F. LIFE INSURANCE POLICIES**

1. \_\_\_\_\_ Policy Number  
Company  
\_\_\_\_\_  
Beneficiary DOD Value/Benefit

2. \_\_\_\_\_ Policy Number  
Company  
\_\_\_\_\_  
Beneficiary DOD Value/Benefit

3. \_\_\_\_\_ Policy Number  
Company  
\_\_\_\_\_  
Beneficiary DOD Value/Benefit

4. \_\_\_\_\_ Policy Number  
Company  
\_\_\_\_\_  
Beneficiary DOD Value/Benefit