When A Loved One Passes Away

Our firm will guide and counsel the Personal Representative or Trustee at each step so that you fully understand the role and the duties required of you. In this way we can ensure that the estate administration will be handled in a smooth and organized fashion. Our process begins when you meet with us to help gather specific information about the estate.

Below is a link to a document entitled **"Estate Administration Questionnaire"**. Please fill this out on behalf of the decedent. The Questionnaire will enable us to record the estate information in one place. We ask that you fill out as much information in the Questionnaire as possible before our meeting. Of course, if you find this to be an overwhelming task, we will be happy to assist you with the Questionnaire during our first meeting and can help you fill it out.

To assist you with gathering the information, below is a "**Document Checklist"** for your convenience. Having these items from the very beginning will help us take care of the details of the estate administration more efficiently and quickly on your behalf.

The goal of this first meeting is to gather as much information as possible in preparation for the opening of the estate. This will save time in the process.

We generally charge on an hourly basis in estate administration matters.

DOCUMENT CHECKLIST

For your convenience, this checklist is provided listing the types of documents you will need to bring to or before your meeting.

✓ **Estate Administration Questionnaire If you have not already provided this information, please complete as much as possible**	
✓ **CERTIFIED DEATH CERTIFICATES (bring at least FIVE (5))**	
✓ **LAST WILL & TESTAMENT OF DECEASED (bring ORIGINAL)**	
✓ **ANY & ALL CODICILS TO THE LAST WILL & TESTAMENT OF DECEASED (bring ORIGINALS)**	
✓ **TRUST(S) (bring ORIGINALS)**	
✓ **ANY & ALL AMENDMENTS TO TRUST(S) (bring ORIGINALS)**	
✓ **TAX RETURNS: STATE (bring LAST 2 YEARS)** **FEDERAL (bring LAST 2 YEARS)** **Gift Tax returns**	
REAL ESTATE INFORMATION- For each real property: **MOST RECENT DEED** **RECENT Property Tax Bill** **Examples: Primary Residence** **Rental Properties** **Time Share Properties** **Mobile Home**	

Please also bring with you the following information to your meeting. Copies will be okay unless originals are requested.

We will need the Statements of Account (as close to the date of death as possible) for the following assets:	
✓ Bank Accounts and/or Credit Unions Accounts including:	
✓ Checking	
✓ Savings	
✓ Money Market	
✓ Certificates of Deposit	
✓ Any notes or mortgage receivables	
✓ IRA, 401-K or other Retirement Account	
✓ Stock, Securities, Mutual Funds/Brokerage Accounts	
We will need the ORIGINALS of the following	
✓ Life Insurance Policies	
✓ Annuities	
✓ Bonds	
✓ (Individual) Stock Certificates	
✓ Organizational documents for any Limited Liability Companies, Partnerships, Family Businesses	
Other:	