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Requested Documents for Estate Administration (Probate) Matters

Below is a list of the documents that are needed in connection with your estate administration/probate matter:

- Certified Copy of Death Certificate(s) for the decedent and predeceased spouse, if any
- Original Last Will & Testament for the decedent and surviving spouse, if any
- Personal Property List/Memorandum for the decedent and surviving spouse, if any
- Original Codicils (updates or changes made to the original Will)
- Original Amendments to the original Trust Agreement
- Trust Documents for the decedent and surviving spouse, if any
- For all real property: Deeds to Real Estate, Title Insurance Policy, most recent property tax statements, certified appraisal (if available), homeowners insurance information
- For all life insurance policies insuring the life of the decedent: Company name, address and phone number, policy numbers
- For all life insurance policies owned by the decedent insuring the life of another person: Company name, address and phone number, policy numbers
- Copy of the decedent's most recent Federal and State Income Tax Returns
- Copies of any Gift Tax Returns filed by the decedent
- Automobile Titles
- Divorce Decree(s), if applicable
- Prior Court Filings, Correspondence, etc.
- Written Notification to Social Security
- Copies of Bank Statements
- Copies of Stock Certificates
- Copies of Bonds
- Copies of Tax Bill(s)
- For interests in any partnership(s) or unincorporated business(es) owned by decedent: a statement of assets and liabilities for the date of death and for the last five (5) years, statements of net earnings for the past five (5) years, contact information for the business' accountant
- Copies of all known debts owed by the decedent (credit card balances, car loans, mortgages, etc.), including outstanding amounts expended by family and friends for debts that should be reimbursed
- Copies of all bills and receipts for any expenses relating to the administration expenses for the estate (funeral, luncheon, obituary, etc.), as well as information regarding amounts expended by the family and friends for these types of expenses