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## **ESTATE ADMINISTRATION CHECKLIST**

These are the items you will need to probate an estate.

- Certified Copies of Death Certificates
- Original Will (and any Codicils to the Will) or a copy of the Will if you cannot locate the original
- Name, Address and Social Security Number of all immediate family members, as well as the name, address and Social Security numbers of any beneficiaries named in the Last Will and Testament
- Photocopy of Executor(s) Driver's License
- Deed to any and all real estate owned by the deceased
- Stocks Certificates
- Bonds
- Latest statements for any and all bank accounts titled individually or jointly with the deceased showing the date of death balance for such accounts
- Latest statements for any and all investment accounts, mutual funds, IRAs, annuities, etc. showing the date of death balance for such accounts
- List of all Personal Property (furniture, jewelry, paintings, silver, etc.) owned by decedent and it's approximate value
- Copy of prior year's Income Tax Return(s)
- Documentation of all gifts made by the deceased **within one year of date of death** – including date of gift, amount of gift and to whom gift was given
- Documentation of any accounts or assets owned by the deceased which were made joint with another person or persons **within one year of death** – including date such account or asset was made joint and with whom
- Documentation of any prepaid funeral and/or burial arrangements
- Documentation of all funeral expenses, including funeral or memorial service costs, music, flowers, headstones/engraving, luncheon costs, etc.
- Documentation of any and all debts (outstanding or paid) of the deceased from the date of their death to the present