

## INFORMATION NEEDED TO BEGIN PROBATE

1. Certified copy of death certificate of decedent
2. Certified copy of death certificate of predeceased spouse, if any
3. Original Will and/or Trust, if any
4. Names, addresses, dates of birth and social security numbers of decedent's children
5. Name and date of death of any predeceased parents and siblings
6. If decedent was on Medi-Cal
7. Previous three years of income tax returns, if decedent filed income tax
8. List of any bills to be paid through probate
9. County of the Superior Court of conviction and booking number if any beneficiary is now, or has previously been, incarcerated
10. Concerning decedent's assets:
  - a. Any property tax statements for real property owned
  - b. A copy of any bank statements reflecting the bank accounts owned
  - c. Certificates of Title or registration for any motor vehicle owned
  - d. Any life insurance policies
  - e. Any securities in decedent's name
  - f. Approximate value of personal property
  - g. Estimated annual income from personal property
  - h. Estimated annual income from real property
  - i. Amount of mortgage on real property
  - j. Any assets held outside of California
  - k. Employee benefits
  - l. Copies of any Promissory Notes or Deeds of Trust
11. From party wishing to be appointed personal representative:
  - a. Name
  - b. Copy driver's license
  - c. Social security number
  - d. Date of birth
  - e. Phone number