

**SUCCESSION WORKSHEET**

1ST MEETING DATE: \_\_\_\_\_

SUCC. OF: \_\_\_\_\_; REF BY: \_\_\_\_\_

ADDRESS AT DEATH: \_\_\_\_\_

DATE OF DEATH: \_\_\_\_\_ SSN \_\_\_\_-\_\_\_\_-\_\_\_\_ DOM/PARISH \_\_\_\_\_

WILL: Y/N OLOG/STAT/NOT (7/1/99) NOTARY \_\_\_\_\_ FEE 2.5% YES/NO

IND EXEC/IND ADM'OR/NAME/ADDRESS: \_\_\_\_\_

IS A TESTAMENTARY TRUST THE BENEFICIARY OF LIFE INSURANCE ON THE LIFE OF THE DECEDENT? **YES/NO** (If yes, claim may have to be made in six months.)

DOES A LIVING PARENT OF THIS DECEDENT HAVE A USUFRUCT OVER ASSETS WHICH HAVE BEEN INHERITED BY THIS DECEDENT? NO \_\_\_\_; YES \_\_\_\_

SAFE DEPOSIT BOX: NO \_\_\_\_; YES \_\_\_\_; BANK \_\_\_\_\_; NO. \_\_\_\_\_

SPOUSE 1: \_\_\_\_\_ ALIVE/ † /DIV

SPOUSE 2: \_\_\_\_\_ ALIVE/ † /DIV

SPOUSE 3: \_\_\_\_\_ ALIVE/ † /DIV

**SURVIVING SPOUSE: MK? YES/NO; RECORDED WHERE \_\_\_\_\_; DOB \_\_\_\_\_**

**NAME:** \_\_\_\_\_ **AGE AT DEC'S DEATH:** \_\_\_\_\_

**ADDRESS:** \_\_\_\_\_ **PARISH/CO.** \_\_\_\_\_

**SSN:** \_\_\_\_-\_\_\_\_-\_\_\_\_ **email** \_\_\_\_\_ **CELL** \_\_\_\_\_ **HO/WK** \_\_\_\_\_

**CHILDREN: ANY DECEASED? Y/N; IF YES, INCLUDE IN LIST MINORS Y/N**

**NAME:** \_\_\_\_\_ **SPOUSE:** \_\_\_\_\_

**ADDRESS:** \_\_\_\_\_

**PARISH/CO.** \_\_\_\_\_ **SSN:** \_\_\_\_-\_\_\_\_-\_\_\_\_ **CELL** \_\_\_\_\_

**email** \_\_\_\_\_ **HO/WK** \_\_\_\_\_

**NAME:** \_\_\_\_\_ **SPOUSE:** \_\_\_\_\_

**ADDRESS:** \_\_\_\_\_

**PARISH/CO.** \_\_\_\_\_ **SSN:** \_\_\_\_-\_\_\_\_-\_\_\_\_ **CELL** \_\_\_\_\_

**email** \_\_\_\_\_ **HO/WK** \_\_\_\_\_

**NAME:** \_\_\_\_\_ **SPOUSE:** \_\_\_\_\_

**ADDRESS:** \_\_\_\_\_

**PARISH/CO.** \_\_\_\_\_ **SSN:** \_\_\_\_-\_\_\_\_-\_\_\_\_ **CELL** \_\_\_\_\_

**email** \_\_\_\_\_ **HO/WK** \_\_\_\_\_

**NAME:** \_\_\_\_\_ **SPOUSE:** \_\_\_\_\_

**ADDRESS:** \_\_\_\_\_

**PARISH/CO.** \_\_\_\_\_ **SSN:** \_\_\_\_-\_\_\_\_-\_\_\_\_ **CELL** \_\_\_\_\_

**email** \_\_\_\_\_ **HO/WK** \_\_\_\_\_

## **SUCCESSION INFORMATION – ASSETS AND DEBTS**

The following is a list of information that we will need to begin work on a succession. We may need more information depending on the types of assets the decedent held; this is a starting point.

### **REAL ESTATE**

Acts of sale of real estate owned by the decedent at death Acts of sale in which minerals were reserved by the decedent

If these are not readily available, we can obtain copies of acts of sale of real estate recorded in Terrebonne Parish or Lafourche Parish (there may be an extra charge depending on the research required). If there is real estate elsewhere, you will need to furnish us with these acts.

### **STOCKS AND BONDS**

Brokerage account statements for the month of death Stock certificates Savings bonds

### **CASH**

Bank statements that include the date of death and the following statement for all checking, savings, and money market accounts Certificates of Deposit or statements if not reported on bank statements

### **MISCELLANEOUS PROPERTY**

Furniture, household goods, personal effects – not necessary to itemize – we will help estimate a "ball-park" fair market value Title or registration for all vehicles and trailers – registration is usually in the glove box Mileage on each motor vehicle Trim level (LS, EX, XLE, Limited, etc.) & options on each vehicle Boats – Louisiana Wildlife & Fisheries certificate – often kept in a jar or Ziploc bag on the boat or in tackle box

### **OTHER ASSETS**

Life insurance policies, IRAs, or annuities payable to the decedent's estate or with no valid beneficiary designation.

### **IF A FEDERAL ESTATE TAX RETURN MUST BE FILED**

Life insurance policies on the life of the deceased person and surviving spouse Statements received following the date of death for Qualified Retirement Plans (401k, 403b), IRAs Annuity contracts

*In some cases we will have to collect information as to the debts of the decedent and surviving spouse such as funeral expenses, medical expenses, credit card balances on date of death, first utilities paid after date of death, mortgage balance on death of death.*