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Practicing in DFW &
Surrounding Areas

Oil and Gas Law
Wills, Trusts, &
Estate Planning
Probate Law
Real Property Law
NFA Gun Trusts

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WHAT TO BRING TO YOUR FIRST PROBATE MEETING

While we would love to have all of the documents possible related to the deceased person's Estate, we know that not everyone has access to some of these documents as of the time of our first meeting. To that effect, if there is an item listed here that you don't have access to, or the deceased person didn't have, or that you can't find, etc., just keep going and submit what you *are* able to find. We can supplement your file when you find or gain access to those items later, but we want to be sure to get started on your case ASAP, so obviously, the more you can provide us up front, the better and more efficiently we can help guide you through the process!

Additionally, please note that, unless we have a signed Legal Services Agreement or some other contract saying otherwise, we are not your attorneys (*yet, anyway!*). We ask for this information in an effort to be sure we advise you to the best degree possible. Everything you submit will be returned to you, and even our consultations are confidential, even if either of us decide not to move forward with our representation.

Please supply as many of the following as possible ***before your first probate case meeting***:

_____ 1. Decedent's "Original" Will and all Codicils thereto. If Decedent seems to have a number of Wills executed during their lifetime, please supply all copies you can find. Also, in the event you cannot locate the "Original," but you *can* locate a copy, please provide that instead.

_____ 2. Any "Memo for Disposition of Personal Effects" located with or near the Will.

_____ 3. Decedent's death certificate (one certified copy for each policy of insurance on Decedent's life, plus one additional certified copy for the file.) Confirm all info on it, particularly the exact dates of death and birth.

_____ 4. Decedent's obituary and any newspaper or other media articles if their death was due to other than natural causes.

_____ 5. Any military papers and documents related to military or VA benefits being received by Decedent or their spouse or payable because of their death.

_____ 6. Most recent financial statements for Decedent and their spouse (6 mos to a year).

_____ 7. Information on or evidence of all real property (not JUST the property Decedent lived in) and major items of personal property (i.e., vehicles) owned by Decedent at the time of their death.

_____ 8. Any documents related to Social Security benefits or Railroad Retirement benefits received by or payable to Decedent or their spouse because of Decedent's death.

_____ 9. Wills and Codicils of surviving spouse.

_____ 10. Any other Agreements or Contracts, especially if Decedent owned a business or was part of a partnership or other business venture.

_____ 11. Approximate total assets of Decedent with short descriptions.

_____ 12. Approximate total debts of Decedent with short descriptions.

_____ 13. Any insurance policies covering Decedent, including life insurance and property and casualty insurance on any vehicles or real property they owned during their lifetime.

_____ 14. Powers of Attorney granted by or given to Decedent.

_____ 15. Any other documents or instruments that you feel would help us evaluate your loved one's case more fully, including explanations of changes in work hours or benefits, etc.

Again, in the event that you're unable to find certain of these documents or the Deceased may not have that document to begin with (i.e., if they were not in the military, they will not have any military records or documents to send, etc.), just gather what you can and either scan them in and email them over to me at kyla@gunterlawgroup.com, send via fax to 817-668-0969 (which comes straight to my desktop, so no cover page necessary), or send or drop off to the office at 930 West 1st Street, Suite 200, Fort Worth, TX 76102.

We look forward to working with you, and we are so sorry for your loss.