

Materials Needed To Begin Estate Administration

Here is a checklist of information about documents and things to bring (if applicable) to begin the administration of the Decedent's Estate. These include:

1. _____ Any last will and testament or codicil of the Decedent and spouse;
2. _____ Any trust agreement of the Decedent and spouse;
3. _____ The deed and all related paperwork about any residence or other pieces of real estate they had an interest in, including the estimated fair market value of all properties;
4. _____ The description of any financial asset (checking account, savings account, certificate of deposit, etc.), owned by the Decedent at their death, and the balance in the account as of the date of death. These should be segregated as far as financial assets owned in the Decedent's name alone, and financial assets that the Decedent owned jointly with some other person;
5. _____ Information about motor vehicles, boats, etc., such as a general description and estimated fair market value;
6. _____ Information about policies of insurance on the Decedent's life to include the name of the insurance company, the policy number, the face amount, and death benefits payable as a result of death, and the beneficiary of each policy;
7. _____ Information about IRA's, retirement plan accounts, 401(k)'s, etc., owned by the Decedent when they died; this would include the balance of any account or retirement fund, together with the designated beneficiary;
8. _____ Any information about any business interests of the Decedent, such as partnership agreements, operating agreements, buy/sell agreements, etc.;
9. _____ An estimated fair market value of the contents of the Decedent's house, including household goods, furnishings and furniture, and personal effects;
10. _____ The name, address, dates of birth (and death if applicable), and Social Security Number for all children of the Decedent and beneficiaries named in the will;
11. _____ Certified death certificates for both the Decedent and spouse if available, otherwise a copy of each;
12. _____ Copies of any recent income tax returns of the Decedent;
13. _____ Information about any outstanding debt of the Decedent; and
14. _____ Information about how and from what funds the funeral was paid for.