

# HARRELL LAW

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## MEMO RE: Probate Consultation

TO: PERSONAL REPRESENTATIVE / EXECUTOR  
FROM: JAMIE E. HARRELL, HARRELL LAW LLC  
SUBJECT: OPENING NEW PROBATE ESTATE

Please find listed below a list of items we will need in order to proceed on your behalf with regard to the administration of the estate:

1. The original will.
2. A copy of the most recent bank statements of any bank accounts held by the decedent individually or jointly.
3. The original life insurance policies. (You may contact the various companies and request death claim forms.)
4. A copy of the itemized funeral expenses from the funeral home and cemetery association.
5. Please order at least 5 death certificates to start with for estate matters.
6. A listing of all the named beneficiaries in the decedent's will including their full legal names, addresses, dates of birth, and social security numbers.
7. A copy of the most recent brokerage statements listing any stock or bond holdings owned by the decedent individually.
8. If the decedent owned stock in companies in which he or she held the original certificates, bring in all original stock certificates. If the stock is held in a dividend reinvestment plan, secure the most recent statement.
9. Please provide us with a listing of all of the decedent's outstanding debts at the time of the decedent's death.

10. Did you or any other individual have a power of attorney for the decedent? If so, please provide copy. Were you or another individual acting under this power of attorney at the time of the decedent's death?

*\*\*\* Please note that the power of attorney ceases at the time of the decedent's death and the power of attorney has no authority to continue to pay bills. The bills will need to be collected until an estate account is opened.\*\*\**

11. Provide us with a copy of the decedent's last two year's income tax returns. Did the decedent have an accountant who could aid in the preparation of the decedent's final income tax return?

12. See if you can locate information with regard to the decedent's insurance coverage on the residence and car.

Please bring all of the above information which you are able to obtain to our initial meeting.

Thank you for the opportunity to be of service to you and your family.

Sincerely,

Jamie E. Harrell  
HARRELL LAW LLC