E. CHECKLIST FOR ESTATE INVENTORY

____ Completed document with original signature(s) and one copy. Signed in blue ink.

____ Box "A" or "B" is marked on page 3. If box "A" is marked, page 4 must be completed and signed by each fiduciary (original signature required).

____ Contact information is current, including email address, if available.

____ The name of each bank or brokerage account is listed, i.e., "Bank of America, checking."

____ Last 4 digits of each account number is listed, i.e., xxx-xx-1234.

____ Itemize each investment in a brokerage account, i.e., name of stock, number of shares and price per share. A separate list may be attached.

____ Joint holder(s) name(s) is listed for any account reflected in part 2 of the form, in addition to bank name and last four (4) digits of account number.

____ Street address or tax ID is reflected for any real property listed in part 3, 4 or 5.

____ Copy of the Last Will and Testament, if decedent died testate.

____ Date of birth for each beneficiary if an age of distribution is referenced in the Will.

____ Trust Affidavit if any assets are distributed to a Revocable Trust.

____ Filing Fee – check made payable to the Commissioner of Accounts.