

CHECKLIST OF DOCUMENTS & INFORMATION FOR PROBATE

- ___ Original Will
- ___ Trust Agreement (including all amendments and restatements)
- ___ Trust Agreement wherein Decedent was a named beneficiary
- ___ Death Certificate
- ___ Deeds to Real Property
- ___ Certificates of Title to Automobiles, Boats, Recreational Vehicles, etc.
- ___ Bank Statements that include date of death transactions
- ___ Brokerage Statements that include date of death transactions
- ___ Signature Cards for bank accounts
- ___ Account Contracts for brokerage accounts
- ___ Copies of stocks and bonds held outside of brokerage account
- ___ Life Insurance Policies
- ___ Annuity Contracts
- ___ Last filed tax return
- ___ Last 3 digits of Applicant's social security and driver license numbers
- ___ Last 3 digits of Decedent's social security and driver license numbers
- ___ Mailing address for each beneficiary who will receive assets in accordance with terms of the Will