SMITH AND MILLER ATTORNEYS

CHECKLIST

PROBATING ASSETS

It is unusual for there to be circumstances that require immediate legal action to probate a will or an estate. Rather, it is a time for family and friends to grieve the loss of a loved one and begin the healing process. Unless family members are returning home quickly, or you have questions or concerns that can't wait, take some time before you schedule an appointment.

For your appointment, bring the following documents:

- ☐ The original last will and testament
- ☐ names, addresses and social security numbers for the surviving spouse, children and named benificiaries.
- ☐ death certificate
- ☐ the deceased social security number
- ☐ Pre nuptial agreements, if any

A list of assets in which the deceased had a full or partial interest

- ☐ copies of all deeds to real estate
- ☐ car and vehicle titles with the name of t he decedent
- ☐ bank accounts with the name of the decedent, including checking, savings, CD's etc.
- ☐ financial accounts with the name of the decedent, including IRA's, stocks, etc.
- ☐ insurance polices owned by the decedent

The last two years of federal income tax returns, if filed.

A list of debts owed by the decedent, include the amount owed and last statement

- ☐ funeral bill
- ☐ Bills from the deceased last illness, including ambulance as well as medical
- ☐ secured debts (mortgages and car payments)
- ☐ Other bills

Please remember that an executor has no duties until appointed by the Court. An executor may be personally liable for mishandling an estate. We are here to help you!