

Probate Preparation Checklist

	Items to Locate	Located	Location/Information	Given to Attorney
1	Decedent's Last Will and Testament Codicils to the Decedent's Last	<input type="checkbox"/>		<input type="checkbox"/>
2	Will and Testament	<input type="checkbox"/>		<input type="checkbox"/>
3	Decedent's Trust	<input type="checkbox"/>		<input type="checkbox"/>
4	Decedent's Funeral Arrangements	<input type="checkbox"/>		<input type="checkbox"/>
5	Decedent's full name, birthdate, social security number	<input type="checkbox"/>		<input type="checkbox"/>
6	Documentation regarding Decedent's citizenship (if applicable)	<input type="checkbox"/>		<input type="checkbox"/>
7	Decedent's safety deposit box	<input type="checkbox"/>		<input type="checkbox"/>
8	Decedent's marriage license	<input type="checkbox"/>		<input type="checkbox"/>
9	Decedent's divorce decrees	<input type="checkbox"/>		<input type="checkbox"/>
10	Decedent's prenuptial agreement	<input type="checkbox"/>		<input type="checkbox"/>
11	Decedent's marital or partition agreements	<input type="checkbox"/>		<input type="checkbox"/>
12	Decedent's children – names, ages, contact information, born or adopted, etc.	<input type="checkbox"/>		<input type="checkbox"/>
13	Death Certificates (order 5 – 10 certified copies)	<input type="checkbox"/>		<input type="checkbox"/>
14	Secure the Decedent's home	<input type="checkbox"/>		<input type="checkbox"/>
15	Decedent's Assets and Debts			
	a) Real Property (need legal description)	<input type="checkbox"/>		<input type="checkbox"/>
	b) Mineral Interests	<input type="checkbox"/>		<input type="checkbox"/>
	c) Rental and Lease Contracts	<input type="checkbox"/>		<input type="checkbox"/>
	d) BankAccounts(need name of bank and account numbers, owners of account, and what type of an account)	<input type="checkbox"/>		<input type="checkbox"/>
	e) Savings Accounts (need name of bank and account numbers, owners of account, and what type of an account)	<input type="checkbox"/>		<input type="checkbox"/>
	f)) Savings & Loan Accounts (need name of bank and account numbers, owners of account, and what type of an account)	<input type="checkbox"/>		<input type="checkbox"/>
	g) Credit Unions (need name of bank and account numbers, owners of account, and what type of an account)	<input type="checkbox"/>		<input type="checkbox"/>
	h) Securities and Investments–stocks, bonds, brokerage accounts, mutual funds, annuities, stock options, etc. (need names, account numbers, and ownership interest)	<input type="checkbox"/>		<input type="checkbox"/>
	i) Security Interest (had the Decedent been granted a security interest in any property?)	<input type="checkbox"/>		<input type="checkbox"/>

	j) Tax Deferred Accounts/Plans – i.e., 401(K) plans, individual retirement accounts (IRA), pension plans, benefit plans, employee stock ownership plans, any other retirement plans – (need names, account numbers, named beneficiaries)	<input type="checkbox"/>	<input type="checkbox"/>
	k) Non-Qualified Benefit Plans	<input type="checkbox"/>	<input type="checkbox"/>
	l) Decedent's Company Benefits (employment trusts, accrued, unpaid bonuses, stock purchase plans, employment contracts)	<input type="checkbox"/>	<input type="checkbox"/>
	m) Life Insurance (need names, account numbers, named beneficiaries)	<input type="checkbox"/>	<input type="checkbox"/>
	n) Military Retirement Benefits	<input type="checkbox"/>	<input type="checkbox"/>
	o) Motor Vehicles (title, make, model, year, Vehicle Identification Number)	<input type="checkbox"/>	<input type="checkbox"/>
	p) Equipment and Machinery (need description, make, model, vin numbers)	<input type="checkbox"/>	<input type="checkbox"/>
	q) Valuable Collections (need specific description of items in collection)	<input type="checkbox"/>	<input type="checkbox"/>
	r) Receivables (Did any one owe the Decedent money?)	<input type="checkbox"/>	<input type="checkbox"/>
	s) Tax Refunds	<input type="checkbox"/>	<input type="checkbox"/>
	t) Tax Prepayments	<input type="checkbox"/>	<input type="checkbox"/>
	u) Lawsuits (Was the Decedent involved in a pending lawsuit at death?)	<input type="checkbox"/>	<input type="checkbox"/>
	v) Pending Claims against the Decedent	<input type="checkbox"/>	<input type="checkbox"/>
	w) Copyrights and Patents (Did the Decedent copyright or patent anything, or was a copyright or patent pending?)	<input type="checkbox"/>	<input type="checkbox"/>
	x) Decedent's Business Associations	<input type="checkbox"/>	<input type="checkbox"/>
	y) Decedent's cash on hand	<input type="checkbox"/>	<input type="checkbox"/>
16	Create List of Decedent's Heirs with full names and contact information	<input type="checkbox"/>	<input type="checkbox"/>
17	Name of Decedent's CPA	<input type="checkbox"/>	<input type="checkbox"/>