Rohde|Dales LLP
Attorneys and Counselors

ESTATE AND TRUST ADMINISTRATION

Information and Documents for Initial Meeting

Our goal is to make the process of settling an estate or trust easy and efficient. One thing that will help us accomplish that is having as much information as possible at our first meeting to begin an estate or trust administration. The following is a checklist of documents and information that you should bring with you to the meeting if you can:

- Will (original)
- Death certificate (two originals)
- Deed and tax bills for any real estate (originals or copies)
- Checkbook register and most recent checking account statement
- Most recent statements for any other bank accounts, CDs, and investment accounts
- Most recent statements for retirement accounts or IRAs
- Information on life insurance policies or annuities (original policies or contracts if available)
- Titles for any vehicles
- Location and the key for any safe deposit box
- Copies of income tax returns for the last three years
- Information relating to any closely-held or family business
- Funeral bill
- Outstanding bills
- Names and addresses of all beneficiaries and heirs
- Social Security numbers of any beneficiaries who receive a share of the estate or trust

Please do not hesitate to contact us if you have any questions about what to bring or if we can assist you with gathering the information that we need.

Contact Us

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