PHELPS LACLAIR

Estate Plans You Can Trust

Preparing for Probate & Estate/Trust Administration

What to gather after a loved one passes away

> You do not need every answer or exact value before your first meeting. Bring the documents and information you can find, and use your best estimates for values when needed.

1 · KEY DOCUMENTS

☐ Original Last Will and Testament and any codicils, if available.

☐ Trust agreement and all amendments or restatements, if applicable.

☐ Certified death certificate(s), if available.

☐ Any deeds, beneficiary designations, prenuptial/postnuptial agreements, divorce orders, or other documents that may affect the estate.

2 · FAMILY, HEIRS & BENEFICIARIES

☐ Names and contact information for the surviving spouse, children, beneficiaries, , as applicable.

☐ Names, birthdates, addresses, and phone numbers for beneficiaries named in the Will or Trust.

☐ Information about any deceased children, adopted children, stepchildren, or anyone intentionally left out of the estate plan.

☐ Any special circumstances involving a beneficiary, including disability, government benefits, creditor concerns, or difficulty managing money.

3 · PEOPLE WHO MAY BE INVOLVED

☐ Name and contact information for the person named as Personal Representative/Executor or Successor Trustee.

☐ Contact information for the decedent’s accountant, financial advisor, insurance agent, real estate agent, or appraiser, if known.

4 · A SNAPSHOT OF THE ASSETS

☐ Real estate, including addresses, how title is held, approximate date-of-death value, and loan balance.

☐ Bank and brokerage accounts, including the institution, account type, ownership/title, and approximate balance.

☐ Retirement accounts, life insurance, and annuities, including known beneficiaries.

☐ Vehicles, boats, RVs, valuable personal property, and collections.

☐ Business interests, promissory notes or money owed to the decedent, and other significant assets.

☐ For each major asset, note how it was owned: individually, jointly, in a trust, or through a business entity.

5 · DEBTS & EXPENSES

☐ Mortgages, loans, credit cards, medical bills, and other known debts.

☐ Recent statements or creditor information, if readily available.

☐ Information about funeral expenses or other significant bills paid after death, if applicable.

6 · HELPFUL DETAILS FOR THE FIRST MEETING

☐ Decedent’s full legal name, other names used, date of birth, date of death, and last address.

☐ A general list is enough to start; exact appraisals and final values are not needed for the first consultation.

☐ Questions or concerns you want to make sure we discuss.

BRING WHAT YOU HAVE. WE CAN HELP IDENTIFY WHAT COMES NEXT.

This checklist is a preparation tool, not a substitute for the full questionnaire your attorney may ask you to complete.