



**DOCUMENTS TO BRING WITH YOU**

Please provide copies of these documents and any documents relating to other assets that were owned by the decedent.

- Will and Trusts
- Recent statements from Banks and Brokerages
- Deeds to real estate
- Tax bills for all real estate
- Copy of Registrations or Titles for all vehicles
- Income tax returns for two years before death
- Life insurance policies
- Annuity contracts
- Corporation or business papers
- Copies of stocks and bonds held by decedent
- IRA and Retirement Plan statements

**FINANCIAL INFORMATION**

1. Did the decedent own a HOME or any other REAL ESTATE?

Address	Name(s) on Title	Mortgage Amount	Market Value

2. Did the decedent own any other TITLED PROPERTY (car, boat, etc.)?

Description	Market Value

3. Did the decedent have any BANK ACCOUNTS?

<b>Name of Bank</b>	<b>Name(s) on Title</b>	<b>Balance</b>
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4. Did the decedent have any RETIREMENT FUNDS (IRA's, 401K's, etc.)?

<b>Company Name</b>	<b>Account Owner</b>	<b>Beneficiary</b>	<b>Current Value</b>
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5. Did the decedent have any BROKERAGE ACCOUNTS (not Retirement Accounts)?

<b>Name of Brokerage</b>	<b>Name(s) on Title</b>	<b>Current Value</b>
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6. Did the decedent hold any STOCKS, BONDS or MUTUAL FUNDS?

<b>Name of Company</b>	<b>Name(s) on Title</b>	<b>Current Value</b>
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7. Did the decedent have any LIFE INSURANCE POLICIES and/or ANNUITIES?

<b>Company Name</b>	<b>Policy Owner</b>	<b>Insured</b>	<b>Beneficiary</b>	<b>Face Value</b>
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8. Did the decedent have a BUSINESS INTEREST/OWNERSHIP?

<b>Company Name</b>	<b>Your Percentage</b>	<b>Market Value</b>
_____	_____	_____
_____	_____	_____

9. Did the decedent have any COLLECTIBLES (antiques, coins, jewelry, etc.)?

<b>Description</b>	<b>Market Value</b>
_____	_____
_____	_____

10. Did anyone OWE the decedent money (mortgage, personal loan, etc.)?

<b>Name of Person who owes</b>	<b>Amount owed</b>
_____	_____
_____	_____

11. Did the decedent have a SAFE DEPOSIT BOX?

<b>Name of Bank</b>	<b>Names on Box</b>	<b>Value of Contents</b>
_____	_____	_____
_____	_____	_____

12. Did the decedent own any PATENTS or COPYRIGHTED material (or ever sold any copyrighted material)?

Please let me know if someone referred you to us that we may thank.

Referred by: \_\_\_\_\_

Phone: \_\_\_\_\_

Do you have any specific questions?

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