Anderson Elder Law

Linda M. Anderson, J.D., LL.M., Certified Elder Law Attorney

LIST OF ITEMS NEEDED FOR INITIAL CONFERENCE FOR ESTATE ADMINISTRATION

Please bring as many as possible of the following documents with you to our first meeting. This will help us to answer your questions more precisely and get you started on the post-death administration process.

1. Original Will, Codicils, Personal Property List, and/or Trust for the decedent and for the surviving spouse, if any.

2. Certified Death Certificates for the decedent and predeceased spouse, if any.

3. Data needed for spouse, children, and all other beneficiaries: name, address and phone number, date of birth (and date of death if predeceased), and social security number.

4. Most recent statements for all accounts (checking, savings, investment, retirement, etc.).

5. Original stock and bond certificates, including savings bonds.

6. Title for all automobiles.

7. For all real estate: Deeds, Title Insurance Policy, most recent property tax statements, and certified appraisal (if available).

8. Life Insurance Policies: Company name, address and phone number, and policy number for all policies insuring the life of the decedent, or policies owned by the decedent on the life of another person.

9. Copy of the decedent's most recent Income Tax Return, and copies of any Gift Tax Returns filed by the decedent.

10. If the decedent owned an interest in a partnership or unincorporated business, a statement of assets and liabilities for the date of death and for the last 5 years, plus statements of net earnings for the same 5 years, or the contact information for the business' accountant.

11. Copies of all known debts owed by the decedent (credit card balances, car loans, mortgages, etc.), including outstanding amounts expended by family and friends for debts that should be reimbursed.

12. Copies of all bills and receipts for any expenses relating to the administration expenses for the estate (funeral, luncheon, obituary, etc), as well as information regarding amounts extended by the family and friends for these type of expenses.

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216 S. Orange St. Media, PA 19063
LAnderson@AndersonElderLaw.com www.AndersonElderLaw.com 610- 566-4700