

## *Information & Assets Listing*

Collecting as much of this information as possible will be helpful to you in the coming days and months. This information will be helpful when you meet with an attorney, as well as other agencies you are in contact with. This information will help the attorney answer your questions, as well as make your meeting as efficient as possible.

<b>Primary Contact Information</b>		
Your Name		
Mailing Address		
Telephone Number (work)		
Telephone Number (cell)		
E-mail address		
Your relationship to deceased		
<b>Decedent's Information</b>		
Full name		
Date of Death		
Date of Birth		
Deceased's SSN		
Where was the deceased employed at the time of death? (if applicable)		
<b>Estate Information</b>		<b>Yes</b>
		<b>No</b>
Is there a will?		
Is there a trust document?		
❖ If yes, take these documents with you. You will want to keep a copy for yourself and give the original to the attorney you decide to hire.		
Is there a personal representative or an executor named in the will?		
If yes, who is named?		
Did the deceased person have a safe-deposit box?		
<b>Family Information</b>		<b>Yes</b>
		<b>No</b>
Was the deceased person married?		
Is the spouse still living?		
What is the name of the spouse?		
Are there any children?		
<b>Names of children</b>		<b>DOB</b>
		<b>Age</b>
<b>Names of grandchildren?</b>		<b>DOB</b>
		<b>Age</b>

<b>Names of Professionals (Include name if known)</b>	<b>Yes</b>	<b>No</b>
Did the deceased person have an attorney?		
Did the deceased have an accountant?		
Did the deceased have a financial planner?		
<b>Decedent's Asset Information: Did the Decedent have any of the following?</b>	<b>Yes</b>	<b>No</b>
Bank account(s)? (Bring a couple of statements to your appointment if possible.)		
Stocks, bonds or certificates of deposit?		
A retirement plan at work?		
Was the Deceased receiving Social Security payments?		
An IRA?		
A business or share ownership of a business? Address:  Type of company? (sole proprietorship, corporation, partnership)		
Own real estate? Address:		
If yes, did the Decedent own more than just one home or parcel of land? Address:		
Own property outside of this state?  Where?		
Did the Decedent have any property rented to another person? If yes, where is the property located? Names of tenants if known.		
Was the Decedent renting any property? If yes, list the address and name of the landlord if known.		
Life insurance policies? (thoroughly check files, they may have been purchased through an insurance agency, employer, professional organization, etc..)		
Any annuities?		
<b>Receivables: Is any money owed to the Decedent?</b>	<b>Yes</b>	<b>No</b>
Are there any promissory notes? Amount owed:		

Installment contract(s) on personal property? Amount owed:		
Promissory notes secured by property? Amount owed:		
<b>Personal Property: Make a brief list here of general items</b>	<b>Yes</b>	<b>No</b>
Household furniture		
Appliances		
Motor home		
Boat		
Automobiles (list year, make, model)		
Special machinery or equipment		
Livestock		
List items of high value:		
<b>Liabilities:</b>	<b>Amount Owed</b>	
Mortgage(s): Name bank  Amount owed:		
Promissory notes Amount owed:		
Credit cards: List names and approximate amount owed if known		
List monthly bills		
Was the deceased person involved in any law suits or pending law suits?		
<b>Questions to ask your attorney:</b>		

