

The Karp Law Firm, P.A.

Estate Administration: Checklist of Needed Items

The following list describes the items our office will need to assist you. Bring as much of the following as possible to your appointment, but do not worry if you can't locate all the items at this point. Just do the best you can. We can always get more of documentation as we proceed.

LEGAL DOCUMENTS:

1. Wills and codicils. Originals, if possible. If you don't have originals, bring copies.
2. Trusts (Restatements and Amendments, if any.). Originals, if possible. If you don't have originals, bring copies.
3. Certified Death Certificates. Bring as many as you have stating cause of death, and as many as you have that do not state cause of death. (These are used for the court, if necessary; to contact financial institutions; to change title on real estate, etc.)

ASSET INFORMATION:

Provide documentation for assets that are titled solely in the name of the decedent; titled in the name of the trust; or jointly owned by the decedent and someone else.

1. Brokerage Statements.
2. Stock Certificates for those stocks individually owned, not with a broker. Bring originals if possible.
3. Original US Bonds, Treasury Notes or other government bearer bonds. Bring originals if possible.
4. Statements from mutual funds, GNMA, dividend reinvestment accounts and the like.
5. Bank statements: checking, savings, money market, CD.
6. Names and addresses for entities from which pension is being received.
7. Life insurance and annuity policies.
8. List of partnerships or interests in any business.
9. Mortgages and notes receivable. Bring originals if possible.
10. Deeds to real property in Florida and out-of-state.
11. Description of valuable jewelry, art, antiques, stamps and coin collections, etc.
12. Title or registration to any type of vehicle, boat, recreational vehicle, mobile home.
13. Frequent flyer miles information (airline, account #, etc.).

CREDITOR INFORMATION: Copies of any bills and creditor addresses.

TAX RECORDS:

1. Any gift tax returns filed.
2. Income tax returns (last three years).
3. Intangible tax returns (last three years)

OTHER:

1. Paid funeral bill.
2. Any other documents, records of statements that you feel may be of importance. If in doubt about an item, bring it.



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