LIST OF ITEMS TO BRING TO INITIAL INTERVIEW
FOR ESTATE ADMINISTRATION (WITHOUT A WILL OR TRUST)

1) Death Certificate (as soon as possible)

2) Names, addresses and telephone numbers of two (2) people who know the Decedent's family history, but have no financial interest in the Decedent's estate

3) Information regarding former marriages, if any, which includes name of former spouse, approximate date and place of termination of marriage by death or divorce

4) Bank & brokerage statements closest to the date of death

5) Copies of current C.D.s, IRA accounts, retirement plans, annuities, tax-deferred investments (i.e., 401(k) plans), insurance policies, and financial statements (if available)

6) Other investments not in brokerage accounts (i.e., stock certificates, savings bonds, etc.)

7) Copy of deeds (real estate)

8) Name, address, and telephone number for your current CPA, financial advisor or broker, and life insurance agent (if applicable)

9) Financial statement and/or last year's tax return for any business interests (corporation, LLC, partnership or sole proprietorship)

10) Copy of titles to all vehicles

11) A list and description of all debts

12) Names, addresses and telephone numbers of two (2) people who know the Decedent's family history, but have no financial interest in the Decedent's estate

13) Information regarding former marriages, if any, which includes name of former spouse, approximate date and place of termination of marriage by death or divorce, with supporting document

If you are not able to easily locate information related to Items #7 through #13, this information may be provided later.