

**LIST OF ITEMS TO BRING TO INITIAL INTERVIEW
FOR ESTATE ADMINISTRATION (WITH WILL OR TRUST)**

- 1) Original Wills, Codicils and Trusts (if applicable)
- 2) Death Certificate (as soon as possible)
- 3) Bank & brokerage statements closest to the date of death
- 4) 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)
- 5) Other investments not in brokerage accounts (i.e., stock certificates, savings bonds, etc.)
- 6) Copy of deeds (real estate)
- 7) Name, address, and telephone number for your current CPA, financial advisor or broker, and life insurance agent (if applicable)
- 8) Financial statement and/or last year's tax return for any business interests (corporation, LLC, partnership or sole proprietorship)
- 9) Copy of titles to all vehicles
- 10) A list and description of all debts

If you are not able to easily locate information related to Items #6 through #10, this information may be provided later.

