

Initial Probate Estate Meeting

What to Bring:

1. Original Last Will and Testament.
2. Trust Agreement(s) – if any.
3. Death certificate.
4. Names, addresses, phone numbers, date of birth and SSN of all “next of kin” – children and others named in the Will.
5. Real estate deeds.
6. Copies of bank account/brokerage statements.
7. Income tax return (most recent).
8. Life insurance policies.
9. IRA/Annuity account information.
10. Automobile certificates of title.