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INITIAL PROBATE MEETING CHECKLIST

To properly prepare a probate strategy, you will need the following items:

1. Original Will
2. Death Certificates: # needed _____.
3. Name, birthday, and social security number of deceased person.
4. Date and cause of death.
5. Name, address and phone numbers of beneficiaries.
6. Name, address and phone numbers of executor(s).
7. Name, address and phone number of other advisors (CPA, stockbrokers, real estate brokers, appraisers).
8. Family Information
 - Parents
 - Children
 - Brothers/sisters
 - Aunts/uncles
 - other
9. Name and address of known creditors (obtain copies of billing statements)

Please also prepare a list of assets:

1. Real Estate:
 - Home - verify if homestead
 - Other real estate - obtain copies of deeds
 - (Verify if real property located in other states)
2. Stocks & Bonds:
 - Brokerage accounts
 - Individually held stock certificates
 - Bonds
3. Money Market Accounts
4. Bank Accounts
5. Trust deeds, first mortgages (we are referring to investments in first mortgages, not your home mortgage)
6. Cars - make, model, and VIN is needed
7. Personal property
8. IRAs and Retirement Plans (Obtain copies of beneficiary designation forms)
9. Life Insurance (Obtain copies of policy and beneficiary forms)
10. Stock options
11. Business entities (Corps, LLCs, partnerships, sole proprietorships)
12. Verify if you will need special experts:
 - Real property appraiser - always (unless it is a set aside, only then can we use comparisons)
 - Stockbrokers re: stock valuation
 - Business appraisers
 - Others

If you would like more information about setting up a Nevada Probate, feel free to call Shannon Evans at 702-699-7333.