THE ESTATE SETTLEMENT PROGRAM™
Expertise. Comfort. Clarity.

Getting Started Checklist™

- [ ] Original of the last will, revocable trust, and any codicils or amendments
- [ ] Original/certified copy of the death certificate
- [ ] Copies of most recent bank and brokerage statements
- [ ] Copies of certificate of deposit statements
- [ ] Savings bonds
- [ ] Copies of deeds to real estate
- [ ] Copies of stock certificates
- [ ] Most recent Form 1040 and/or 1041 Tax Returns
- [ ] Federal Gift Tax Returns Form 709s previously filed
- [ ] Estate Tax Return Form 706 for predeceased spouse, if any
- [ ] Information related to any unreported taxable gifts
- [ ] Information regarding loans, notes, mortgages, and indebtedness
- [ ] Most recent credit card statements
- [ ] Amounts paid towards burial, clergy, service, and reception
- [ ] Addresses and contact information of family members who may be beneficiaries, heirs, as well as those serving as co-personal representative and/or trustee
- [ ] Names and contact information of financial advisors, insurance agents, CPAs, tax return preparer, and other such professionals
- [ ] Copies of ownership interests in closely held businesses and any shareholders or partnership agreements that the deceased may have been a party to
- [ ] Prenuptial, postnuptial agreements or divorce agreements, if any
- [ ] Copies of trusts and related account statements of which the deceased was a beneficiary at the time of his or her death
- [ ] Copies of irrevocable trusts that the deceased created, such as an Irrevocable Life Insurance Trust, Grantor Retained Annuity Trust, Qualified Personal Residence Trust, etc.
- [ ] Copies of account statements, deeds, Crummey notices and other such relevant information if decedent created an irrevocable trust
- [ ] Tangible personal property lists signed by the deceased that directed the distribution of any personal property items
- [ ] Automobile titles
- [ ] Information related to any safe deposit box
- [ ] Life insurance policies and statements, including copies of the beneficiary forms
- [ ] Annuity information, including gift annuities