

HANDELMAN LAW OFFICE PROBATE CHECKLIST

ESTATE OF _____

_____ ORIGINAL WILL.

_____ CERTIFIED COPY OF DEATH CERTIFICATE

_____ NAME AND DATE OF DEATH OF DECEASED SPOUSE, IF APPLICABLE

_____ DECEASED SPOUSE'S SS#

_____ CASE NO. OF DECEASED SPOUSE'S ESTATE

COUNTY WHERE ESTATE WAS PROBATED: _____

_____ NAMES AND ADDRESSES OF INDIVIDUALS NAMED IN WILL

_____ NAMES AND ADDRESSES OF SURVIVING CHILDREN/NEXT OF KIN

_____ DEED(S) TO REAL PROPERTY OWNED BY DECEASED

_____ CAR AND MOBILE HOME TITLE(S)

_____ BOAT AND TRAILER TITLES

_____ ALL CHECKING ACCOUNT NUMBERS AND A DATE OF DEATH BALANCE

_____ SAVINGS ACCOUNT NUMBER AND DATE OF DEATH BALANCE

Note: we will eventually need copies of statements for all savings accounts for six months prior to the date of death of the deceased if the balance in any account is over \$25,000

COPIES OF CERTIFICATES OF DEPOSIT

_____ COPIES OF ALL STOCK CERTIFICATES.

_____ COPY OF FUNERAL BILL AND COPY OF RECEIPT IF PAID

_____ STATEMENTS AND/OR NAME AND ADDRESSES OF THE DECEASED'S CREDITORS

_____ COPY OF DECEASED'S INCOME TAX RETURN FOR THE PREVIOUS YEAR

_____ COPY OF TAX BILL (IF ANY REAL ESTATE IS INVOLVED)