GENE D. ROBINSON III
ATTORNEY AT LAW

ESTATE AND/OR TRUST ADMINISTRATION CHECKLIST

Please bring to the initial consultation as many of the following documents as are applicable to the deceased:

- Death Certificate
- Existing Wills, Codicils, or Trust Agreements
- Life Insurance Policies
- Deeds to real property
- Last Year's Income Tax Return
- Prenuptial, marital agreements
- Social Security and Veteran Administration information
- Most recent Bank statements
- Most recent Brokerage account statements
- Statements showing any debts ex. Mortgage statement, credit card statements, promissory notes
- Deeds of Trust or Promissory notes for money owed to Decedent
- Title certificates for vehicles, boats, etc.
- Copies of any gift tax returns
- IRA, 401k statements
- Stocks and bonds statements
- Savings bond certificates
- Safety deposit box information
- Rental agreements
- Copy of most recent real estate assessment
- Employer information
- Any other information you that might be important
- Medicaid Information

Information to Gather:

- Information (names and addresses) on all next of kin (spouse, children, parents, siblings, etc.)
- Information on all other Will or Trust beneficiaries
- Date of birth of beneficiaries under 18 years of age

- Information on any beneficiaries with special needs or receiving government benefits (for example, a beneficiary who receives supplemental security income due to a disability)