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ESTATE SETTLEMENT INITIAL INTERVIEW CHECKLIST

Make sure you bring as much of the following information about the decedent with you as possible:

- C the Will, if there is one
- C the Death Certificate, original required to be filed with Register of Wills at probate
- C the decedent's Social Security Card
- C the complete addresses and social security numbers of all persons mentioned in the will or if there is no will, of all the members of the immediate family
- C all deeds and records of all property interests
- C all stock certificates and bonds
- C all bank books, check books and certificates of deposit
- C all vehicle titles
- C all annuities
- C all retirement plans
- C all life insurance policies

In addition to information about what the decedent owned, we will need the following information about any obligations owed by or on behalf of the decedent:

- C the funeral bill and bill for flowers and the gravemarker
- C the cost of the funeral dinner
- C all medical bills
- C all other debts owed by the decedent

If all of the above information is not available at the time of the first interview, it can be supplied later, but it is helpful to get as much of the necessary information at the first interview as possible. If you have any questions, please feel free to call the office.

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