DOCUMENT CHECKLIST FOR ESTATES

Please gather and provide to Hawkins Elder Law copies of any of the following documents that apply to the Decedent (i.e. the person who has died):

- Original Last Will and Testament if the Decedent had one (not just a copy, but the originally signed document)
- List of Estate Beneficiaries (Decedent's family or those persons named in the Will):
    - Full name including middle initial
    - Address
    - Telephone Number
    - Date of Birth
- Death Certificate of the Decedent
- Real Estate Deeds
- Real Estate mortgage statements and information
- Real Estate Appraisals if done within the last 3 years
- Residential Leases (in which the Decedent is either the tenant or the landlord)
- Farm Leases (in which the Decedent is either the landowner or the farmer)
- List of Vehicles, whether titled or not, including, cars, trucks, RVs, trailers, motorcycles, 4 wheelers, golf carts, jet skis, boats, etc,
- Vehicle Titles, milage, and features information
- Checking or Savings Account Statements
    - Statement that includes the date of the Decedent's death; and
    - Any statement after the Decedent's death going forward
- Certificates of Deposit
- Investment and/or Retirement Account Statements
    - Statement that includes the date of the Decedent's death; and
    - Any statement after the Decedent's death going forward

- Brokerage Account Statements and information
- Savings Bonds
- Stock certificates and/or statements
- Decedent’s most recently filed income tax returns.
- Accountant or Tax Preparer Information
- Life Insurance Policies
- Annuity Policies or Contracts
- Unpaid bills or invoices of the Decedent
- Funeral Documents (whether or not the funeral was pre-paid)

If you have any questions about this checklist, please do not hesitate to contact our staff.