CONTACT INFORMATION

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Further information may be accessed on our website at www.goldbergsimpson.com

What to Bring to the First Attorney Meeting

The checklist below provides the attorney with the information necessary to evaluate the probate issues.

Information about the Deceased:

- ❑ Full legal name
- ❑ Address
- ❑ Date of birth
- ❑ Date of death
- ❑ Marital status
- ❑ If married, was there a prenuptial agreement?
- ❑ Social security number
- ❑ List of assets, such as:
    - ❑ Bank accounts, brokerage accounts, CDs, savings, checking, money market accounts
    - ❑ Real estate
    - ❑ Life insurance
    - ❑ Retirement
    - ❑ Farm equipment
    - ❑ Vehicles
    - ❑ Personal property
- ❑ Was the deceased receiving Medicaid?
- ❑ Did the deceased have any ownership in a business (corporation, partnership, LLC)?
- ❑ Was the deceased a veteran? If so, what were the years of active military service?

Information about you:

- ❑ Full legal name
- ❑ Address
- ❑ Phone (work and home)
- ❑ Cell number
- ❑ Relationship to the deceased
- ❑ E-mail address
- ❑ Social security number
- ❑ Date of birth

What to Bring to the First Attorney Meeting (continued)

Other information:

All heirs/beneficiaries and representatives:

- Full legal names
- Addresses of all beneficiaries/heirs
- Relationship to deceased
- Social Security numbers
- Dates of birth

Documents (if available):

- The original Last Will and Testament
- Any trust documents to which the deceased was a recipient or created
- Deeds and/or leases to all real estate (if available)
- Death certificates (if available)
- An account statement for each of the deceased's accounts (bank, brokerage, CD, IRA, 401(k), etc.)
- Stock certificates
- Information about closely held businesses
- Life insurance policies
- Vehicle title and registration documents
- Boat/plane title documents
- Retirement beneficiary forms
- Divorce documents (if divorced)
- Funeral bills
- Any and all other bills
- Any document showing what the decedent may have owed (loans, credit cards, mortgages etc.)
- Any documents showing who might owe the decedent (promissory notes, etc.)
- Any information about charitable pledges
- Tax returns for last three tax years

Checklist Upon Death (some items may not apply)

To do immediately:	**Date Completed:**
❑ Read will/letter of instructions	____________
❑ Notify relatives	____________
❑ Notify friends	____________
❑ Begin funeral arrangements	____________
❑ Make funeral arrangements (request copies of death certificate)	____________

To do *after* appointment by Court:

- ❑ Open new checking account as executor/administrator in your name (consult attorney) ____________

  Necessary Documents to open Estate Account:

  - ❑ Copy of Order of Appointment
  - ❑ Copy of Death Certificate
  - ❑ Copy of Tax ID Number

❑ Notify landlord, change utilities, etc.	____________
❑ Advise Post Office to forward mail	____________
❑ Check homeowners insurance for unoccupied house coverage	____________
❑ Stop publications/mail	____________
❑ Arrange for lawn care, other home maintenance	____________
❑ Arrange care for any pets	____________
❑ Change name on any joint checking and savings accts.	____________
❑ Notify IRA and Keogh accounts	____________
❑ Notify insurance companies and file claims	____________
❑ Notify Veterans Administration to apply for benefits	____________
❑ Notify Social Security to stop/apply for benefits	____________
❑ Notify Medicare, if applicable	____________
❑ Notify decedent's employer benefits office	____________

Checklist Upon Death (some items may not apply)

- ❑ Review auto insurance for accidental death, medical, or other coverage ________________
- ❑ Review medical policies for limits or additional coverage ________________
- ❑ Check for travel accident coverage, if applicable ________________
- ❑ Check for Workers' Compensation benefits ________________
- ❑ Check credit card and club membership benefits ________________
- ❑ Check for safe deposit box and who has access (when access allowed inventory contents) ________________
- ❑ Change name on credit accounts or close ________________
- ❑ Change name on utility accounts ________________
- ❑ Make a detailed list of creditors (to provide to your attorney) ________________
- ❑ File appropriate tax returns (consult attorney) ________________