(PAGE THREE)   Information regarding handling a decedent's estate

We understand that in most cases, this is a stressful and trying time for you. You don't necessarily have to bring anything to the first appointment. We can simply go over all the aspects of what is needed to handle the estate and then get the items we need as we go along.

However, below is a list of items usually needed to begin processing the estate in the event of a death.

Obviously, some of these documents may not exist or be applicable.

Estate Documents:

Original Will

Original Trust

Death Certificate

Names and addresses of everyone named in Will and/or Trust

Names and addresses of "next of kin" if NOT named in Will and/or Trust

Assets held in decedent's name (individually or jointly):

Bank Accounts:	Statements from bank around date of death
Real Estate:	Copies of deeds
	If mortgaged, copy of most recent statement
Investments:	Stock certificates
	Statements of investment accounts
Life Insurance:	Policies
	Most recent statement
Vehicles	Copies of titles or "memorandums of title"

Bills: You may bring copies of recent bills including the funeral bill, but they are usually not necessary for the first appointment.

It is my goal that after our first meeting, you will know what has to be done; approximately how much it is going to cost; and approximately how long the process will take.