PROBATE PROCEDURE

CLIENT DOCUMENT CHECKLIST

Please prepare to gather the following information in order to proceed with the probate process; this is usually the responsibility of the proposed Personal Representative.

1. **DECEASED**

   Full Name(s) of Deceased
   Last Will & Testament (original, copy)
   Death certificate (SS#)
   Date of birth – place of birth
   Date of death – place of death

   Estate tax return: only required if passed before 2010 and real estate involved

2. **PERSONAL REPRESENTATIVE (ADMINISTRATOR, EXECUTOR)**

   Names & Addresses of:
   - Proposed Personal Representative(s)

   Names & Addresses of Heirs/Beneficiaries/Devisees/Legatees:
   - Spouse of deceased (if deceased, death certificate)
   - Children of deceased (living & deceased)

3. **ASSETS OF DECEASED**

   Real estate: location & legal description (copy of deed, if available)
   Mineral (oil & gas interests, royalties): location & legal description
   Financial accounts
   Personal Property
   - Automobiles
   - Inventory of Personal property and household items

4. **CREDITORS OF DECEASED**

   Names & Addresses of known creditors (medicals, mortgages, credit cards, lines of credit, utilities, etc.)