JORDAN BALKEMA
ELDER LAW CENTER

THINGS TO BRING TO YOUR INITIAL APPOINTMENT FOR PROBATE OR TRUST ADMINISTRATION

Original Estate Plan
- Trust
- Amendment to Trust
- Will
- Codicil to Will
- Original Deeds
- Personal Property Assignment

Any handwritten lists gifting personal property ☐

Vital records or Court Orders

- Birth Certificate
- Certified Death Certificates
- Adoption Records
- Divorce Judgments
- Guardian or Conservator Orders

Liability Information

- Any known bills or creditors

Information regarding Beneficiaries

(Individuals entitled to receive under a **Trust Agreement**)
Note: If beneficiary is a minor or legally incapacitated individual, provide information for the parent or legal guardian/ representative.

- Legal Name
- Date of Birth
- Social Security Number
- Current Address
- Current Telephone Number
- E-mail address, if any

Information regarding Devisees and Disinherited Individuals

(Individuals entitled to receive under a Will and those who have specifically been disinherited)
Note: If you are unable to obtain social security numbers, we will send a request to the beneficiary.

- Legal Name
- Date of Birth
- Social Security Number
- Current Address
- Current Telephone Number
- E-mail address, if any

For a PROBATE ESTATE, we will also need information regarding the following legal heirs:

- Surviving Spouse
- Surviving Children
- Children of any deceased Children (Grandchildren)
- If no one within 1 – 3 above, then the surviving Parents
- If no one within 1 – 4 above, then the surviving Siblings and Children of any deceased Siblings

Asset Information

- Bank statement(s)
    - Checkbook register(s)
- Last Investment Statements
    - Broker contact information
- Income Tax Returns for past two years
    - Tax preparer contact information
- Business Records
- Real Estate Documents
    - Deeds and Tax Notices
- Life Insurance and Annuity Policies
- Other Assets
    - Promissory Notes
    - Savings Bonds
    - Stock Certificates
    - Joint Accounts
    - Vehicle Titles
    - Manufactured home titles or Affidavit of Affixture