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DOCUMENT CHECKLIST

For your convenience, we provide this checklist to you listing the types of documents that we suggest that you assemble and bring with you to your initial meeting with our firm.

- Estate/Trust Administration Questionnaire completed as thoroughly as possible
- Certified Death Certificate if this is the administration of a decedent's estate
- Original of Last Will and Testament (and any and all Codicils and Personal Property Lists) of the deceased if this is the administration of a decedent's estate
- Original of Trust Agreement (and any and all amendments to the Trust) if this is the administration of a trust
- Original of Durable Power of Attorney if this is the administration of an incapacitated person's financial estate who is still living
- Copies of state and federal tax returns that have been prepared and filed for the two preceding years from the date of death or incapacity
- Copies of any federal gift tax returns that have been prepared and filed at any time in the past
- Copies of the most recent account statements that are available for the following financial accounts:

  ✓ Bank accounts and/or credit union accounts, including:

  ✓ Checking

  ✓ Savings

  ✓ Money Market

  ✓ Certificates of Deposit

  ✓ Any Promissory Notes receivable

  ✓ IRA, 401-K or other retirement plan accounts

  ✓ Stock, securities, mutual fund/brokerage accounts

- Copies of the following additional assets:

  Life Insurance Policies

  Annuities