

Documents for Initial Meeting with
Musial & Musial, LLC
for
Estate and Trust Administration

Name of Deceased: _____ Date of Death: _____

Items Required:	<u>Have</u>	<u>Need to Get</u>	<u>Not Applicable</u>
1. Death Certificate.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Last Will & Testament.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Trust Agreements.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. List of all immediate family members, with addresses.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Funeral Bill.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Listing of any other bills/creditors.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Last three (3) years income tax returns.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Car Titles.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Boat and Trailer Titles.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Deeds to real estate (Including warranty deeds, quit claim deeds, mortgage deeds and title insurance policies).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Copy of most recent homeowner's insurance policy or statement.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Copies/originals of all bank account statements, brokerage account statements, and mutual fund statements for two (2) months prior to death until present.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Copies/originals of any Stock certificates or Bonds.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. Current checking account registers.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. Life Insurance policies (Including any change of beneficiary designations).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16. Copy of account applications and beneficiary designations for any Individual Retirement Account.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17. Annuity contracts and beneficiary designations.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18. Copy of a pre-nuptial or anti-nuptial agreement.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19. Copies of any divorce, dissolution or annulment judgments, and any related separation agreements.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20. Copies of any gift tax returns.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21. Copies of Deceased's Driver license, State ID, Medicare card, and Medicaid authorization, if any.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>