Documents for Initial Meeting with Musial & Musial Co. LPA for Estate and Trust Administration

Name of Deceased:

Date of Death:

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