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DOCUMENTATION REQUESTED OF EXECUTOR OR TRUSTEE

1. Real Estate:
 - a. Statutory Warranty Deed from purchase of property by decedent and any later deeds.
 - b. County Assessment statement for real property taxes.
 - c. Note and Deed of Trust or other documentation of debt secured by property;
 - d. Billings for debts existing on date of death.
 - e. Copy of all leases.
 - f. Agreements for sale.
2. Bank accounts and Certificates of Deposit:
 - a. Monthly statement from month before death and monthly statement from month after death.
 - b. Checks written before date of death but not processed by bank by date of death.
 - c. Copy of signature card or contract by which decedent opened account.
3. Personal Documents:
 - a. Original Will and codicils.
 - b. Powers of Attorney.
 - c. Trusts.
 - d. Birth Certificate.
 - e. Marriage Certificate.
 - f. Death Certificate.
 - g. Funeral or Burial or Cremation instructions and contracts, if any.
 - h. Social Security Number.
 - i. Copy of Green cards of decedent and beneficiaries, if applicable.
4. Insurance Policies on decedent's life:
 - a. Original Policy
 - b. Credit Card company and accident insurance, if applicable.
 - c. Written confirmation of benefits, dividends, and loans.
 - d. Name of designated beneficiary.
5. Beneficiaries, Spouse and Descendants:
 - a. Names, Addresses, Ages, and Social Security Numbers.
 - b. Particulars of any minors or incapacitated persons

6. Stocks and Bonds:
 - a. Brokerage Statement for the month before and after death.
 - b. Copy of share certificates or bonds if physically held by decedent.
 - c. Copy of signature cards or contracts for all accounts with broker.
 - d. CUSIP number.
7. Safety deposit box details, including inventory.
8. Income tax returns for the past five years.
9. Gift tax returns if taxable gift was ever made during life.
10. Motor Vehicles, Boats, Planes:
 - a. Copy of Registration.
 - b. Title.
 - c. Copy of loan documents, if any.
11. Agreements or orders to which decedent was a party.
 - a. Dissolution Decree and Separation Contract and Decree, if any.
 - b. Guarantee.
 - c. Buy-sell agreement.
 - d. Partnership or shareholders agreement..
 - e. Limited Liability Company or corporation.
 - f. Lease.
 - g. Employment Agreement.
12. Annuities, Pensions, and Death Benefits.
 - a. Copies of same.
 - b. Beneficiary designations, if any.
 - c. Social Security.
 - d. Deferred profit sharing plan.
 - e. Employer statement of benefits prior to and after death.
13. Financial Statements, either personal or of businesses and private companies in which deceased was interested.
14. Debts and Liabilities:
 - a. Statements from month before death and month after death.
 - b. Any documentation of same.

Caveat: List all assets decedent had an interest in whether located in US or outside and identify country asset is located in.