

KIPNIS & BARNES, LLP
ATTORNEYS AT LAW

Telephone (858) 623-1111
Facsimile (858) 623-9114

11622 EL CAMINO REAL, SUITE 100
SAN DIEGO, CALIFORNIA 92130

hkipnis@hicksonkipnis.com
www.kipnisandbarnes.com

ESTATE ADMINISTRATION - INITIAL CHECKLIST

Please complete and acquire as much of the following as possible and bring this and the items to our office at the time of the initial meeting with the attorney.

Decedent's name _____
SSN _____ DOD _____
Spouse's name _____
SSN _____ DOD _____
At time of death: will no will living trust
Trustee/Executor/Administrator _____
Address _____
Phone No. _____ Email address _____
Employer/contact: _____ / _____ Phone No. _____
Attorney _____ Phone No. _____
Accountant _____ Phone No. _____
Broker/Financial Planner _____ Phone No. _____
Life Insurance Agent _____ Phone No. _____
Approximate size of estate \$ _____

Documents needed (* = supply documents for month of decedent's death):

- _____ 1. Death certificate (certified copy)
- _____ 2. Original Wills and Codicil(s), if any
- _____ 3. Original Trust and Amendment(s), if any
- _____ 4. Income Tax return (most recent three years)
- _____ 5. Gift tax returns (any that have been filed)
- _____ 6. Copies of checking account and CD statements *
- _____ 7. Current brokerage account statements *
- _____ 8. Copies of stock and bond certificates if not held by broker
- _____ 9. Copies of deeds to real property
- _____ 10. Copies of property tax bills for real estate owned
- _____ 11. Copies of life insurance policies or settlement checks
- _____ 12. Name and address for limited or general partnership investments
- _____ 13. Copies of promissory notes
- _____ 14. Copies of any IRA 401(k), pension or annuity statements *
- _____ 15. Copies of all vehicle registrations (car, boat, motor home, airplane)
- _____ 16. Copies of any leases
- _____ 17. List of decedent's debts or debts the decedent was a guarantor or co-signor (include name and address of creditor)
- _____ 18. List funeral expenses
- _____ 19. List of any collectibles (i.e. artwork, coins, jewelry) owned by decedent
- _____ 20. Documentation for any other assets owned (i.e. royalty agreements, copyrights trademarks, patents, franchises)
- _____ 21. List of both heirs and beneficiaries that includes name, age, social security no., address, phone no. and relationship to decedent