

# Documentation *Checklist*

By using this checklist and gathering and organizing all necessary documentation, you can simplify the probate process and assist in the systematic management of the deceased individual's estate.

- ❑ **Death Certificate:** Obtain multiple certified copies of the deceased individual's death certificate.
- ❑ **Original Will (if applicable):** Locate and secure the original copy of the deceased individual's will.
- ❑ **Inventory of Assets:** Compile a comprehensive inventory of the deceased individual's assets, including real estate properties, bank accounts, etc.
- ❑ **Financial Records:** Gather all relevant financial records, including bank statements, investment accounts, retirement accounts, tax returns, and insurance policies.
- ❑ **Debts and Liabilities:** Document any outstanding debts or liabilities owed by the deceased individual, such as mortgages, loans, credit card debts, and unpaid bills.
- ❑ **Executor Appointment Documentation:** This information may be included in the will, or the court will appoint a Personal Representative if there is no will.
- ❑ **Beneficiary Information:** Obtain contact information for all beneficiaries named in the will or entitled to inherit under intestacy laws if there is no will.
- ❑ **Legal Documentation:** Consult with an attorney to ensure that all necessary legal documentation is prepared and filed correctly.
- ❑ **Real Estate Documents:** Gather deeds, titles, and other relevant documents for any real estate properties owned by the deceased individual.
- ❑ **Court Forms and Filings:** Complete and file all required court forms and documents with the probate court.
- ❑ **Communication Records:** Maintain detailed records of all communications related to the probate process, including emails, letters, and phone calls with beneficiaries, creditors, attorneys, and other parties involved.
- ❑ **Probate Court Orders and Notices:** Keep copies of all probate court orders, notices, and correspondence received from the probate court.