

ITEMS NEEDED FOR 1ST APT.
REGARDING ESTATES

1. Property Deed
2. Property Tax Duplicates
3. Checking & Savings Act. Book
4. Most recent bank statements
5. Certificates of Deposit (original)
6. Stocks - Bonds (original)
7. Annuities –IRA’s etc.
8. Decedent's SS Card
9. Original Will
10. Car, truck, boat, boat motor, trailer and mobile home titles
11. Mileage of **each** vehicle
12. Life Insurance Policies
13. Homeowners Policy
14. Funeral Bill
15. Income Tax Returns (for the last three years)
16. Antenuptial (Prenuptial) Agreement
17. Any other bills that deceased had at the time of death
18. **Certified copy of the Death Certificate**
19. Names, Addresses & Social Security number of all Heirs – including everyone named in Will (i.e.: children, and if there are any deceased children we need **their** children’s names, addresses and Social Security numbers).

IF THE DECEASED PERSON IS A WIDOW - WE MUST
HAVE THE FOLLOWING INFORMATION:

1. Name of Deceased Spouse
2. Social Security number of Deceased Spouse
3. Date of Death of Deceased Spouse
4. Case Number of Deceased Spouse's Estate
5. County of Deceased Spouse's Estate
6. **COPY OF THEIR DEATH CERTIFICATE** (if possible)