LAW OFFICE OF ROBERT M. MANSOUR

ESSENTIAL DOCUMENTS IN TRUST ADMINISTRATION & PROBATE

The following documents are needed to handle a trust administration & probate. Please assemble as many as you can (don't worry if you can't find everything right now):

1. Original Documentation of all Wills and Codicils (if estate plan was not prepared by our office).

2. Original Documentation of all Trust and Amendments established by the decedent (if the estate plan was not prepared by our office).

3. The most recent statements for all accounts on which the decedent's name appears as either sole or co-owner in any capacity, or as trustee. Recent statements for the following accounts are needed: Bank Accounts, CD's, Annuities, Brokerage or Investment Accounts, and any other financial asset information.

4. Certified copies of the death certificate (if available, please provide at least 3 copies).

In addition the following information and documents are also required to handle a trust administration or probate but are not initially essential if they are not readily available, but will eventually become necessary:

1. All IRA and qualified pension benefit documents, including beneficiary designation forms and plan descriptions.

2. Certificates of title ("pink slips") for all automobiles, recreational vehicles, boats, trailers, motorcycles, airplanes, etc., in which the decedent had any ownership interests.

3. All life insurance policies and annuity contracts including beneficiary designation forms.

4. All deeds to real property in which decedent had an ownership interest.

5. Most recent personal income tax return of the decedent.

6. Copies of all debts, bills, credit card statements, hospital and doctor bills, funeral expenses.

7. Stock certificates, bonds, deeds of trust, notes, etc.

8. Information regarding safety deposit boxes and contents.

If you have any questions, please call our office.