



## Getting Started Checklist™

- Original of the last will, revocable trust, and any codicils or amendments
- Original/certified copy of the death certificate
- Copies of most recent bank and brokerage statements
- Copies of certificate of deposit statements
- Savings bonds
- Copies of deeds to real estate
- Copies of stock certificates
- Most recent Form 1040 and/or 1041 Tax Returns
- Federal Gift Tax Returns Form 709s previously filed
- Estate Tax Return Form 706 for predeceased spouse, if any
- Information related to any unreported taxable gifts
- Information regarding loans, notes, mortgages, and indebtedness
- Most recent credit card statements
- Amounts paid towards burial, clergy, service, and reception
- Addresses and contact information of family members who may be beneficiaries, heirs, as well as those serving as co-personal representative and/or trustee
- Names and contact information of financial advisors, insurance agents, CPAs, tax return preparer, and other such professionals
- Copies of ownership interests in closely held businesses and any shareholders or partnership agreements that the deceased may have been a party to
- Prenuptial, postnuptial agreements or divorce agreements, if any
- Copies of trusts and related account statements of which the deceased was a beneficiary at the time of his or her death
- Copies of irrevocable trusts that the deceased created, such as an Irrevocable Life Insurance Trust, Grantor Retained Annuity Trust, Qualified Personal Residence Trust, etc.
- Copies of account statements, deeds, Crummey notices and other such relevant information if decedent created an irrevocable trust
- Tangible personal property lists signed by the deceased that directed the distribution of any personal property items
- Automobile titles
- Information related to any safe deposit box
- Life insurance policies and statements, including copies of the beneficiary forms
- Annuity information, including gift annuities