

PROBATE LIST

There are a number of documents that are needed to settle your loved one's estate. Here is a list of documents you may need:

- Last Will and Testament or any other estate planning documents**
- Safe deposit rental agreement and keys**
- Passwords for computers and online accounts**
- Living trust agreements**
- Life insurance, health/accident and sickness insurance policies**
- Financial statements, including those pertaining to bank accounts, pensions, individual retirement accounts (IRAs), certificates of deposit, stocks and bond certificates**
- Income tax returns for the past three years**
- Birth and death certificates**
- Deeds, deeds of trust, mortgages and mortgage releases, title policies, motor vehicle titles, lease statements for auto or real estate rentals**
- Military records and discharge papers**
- Unpaid bills and notes**
- Bankruptcy filings and releases**
- Nuptial agreements, marriage license, divorce papers**

Once you locate these important papers, make sure and put them together in a safe place.



THE ASHMORE LAW FIRM, P.C.

Expertise. Experience. Excellence.