

LAW OFFICE OF

# ALISSARAINESSCHURR

**DOCUMENTS NEEDED FOR INITIAL CLIENT MEETING:**

Original Will, Codicil and Trusts  
Original Death Certificate  
Copies of Federal income tax returns of decedent for the last 3 years  
Copies of all Federal gift tax returns ever filed by the decedent  
Diagram of Family Tree  
Names, addresses & phone numbers of surviving family members  
Names, addresses & phone numbers of other heirs named in Will  
List of assets with approximate value (see IAssets column below)

**ASSETS:**

Real Property (home, condo)  
Co-operative Housing  
Bank Accounts (checking/savings)  
Brokerage Accounts  
Life Insurance Policies  
Annuities  
Savings Bonds  
Stock in a corporation  
Business/Employment Assets  
Retirement Assets (pensions, profit sharing plans, 401K, IRA)  
Motor Vehicles (car, boat, airplane, etc.)  
Accounts Receivables (loans made by decedent to others)  
Personal Property  
Safe Deposit Box Contents

**DOCUMENTS NEED TO MARSHAL ASSETS:**

Copy of Deeds for real property  
Copy of stock certificate and proprietary lease for co-ops  
Copy of most recent statements for all bank, savings , etc.  
Copy of most recent statements for all brokerage accounts  
Copies of policies of insurance  
Copy of all annuity contracts  
Copy of any original savings bonds held by decedent  
Copy of any original stock certificates held by decedent  
Copy of all agreements  
Copy of most recent statement for pensions, profit sharing, 401K plans, etc.  
Copies of titles to all motor vehicles registered in the name of the decedent  
Copies of all accounts payable to decedent including name/address of debtor  
A list of art, antiques, collections or other valuable personal property  
Inventory of Safe Deposit Box

**LIABILITIES:**

Funeral Expenses  
Medical Expenses  
Other Expenses incurred by Estate

**DOCUMENTS NEEDED TO PREPARE TAX RETURNS:**

Copy of all funeral bills: cemetary lot, monmuments, flowers & memorial svcs.  
Copies of all medical bills paid on behalf of the decedent