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**CHECKLIST OF DOCUMENTS NEEDED TO ADMINISTER THE ESTATE**

**A. Of immediate importance:**

- \_\_\_\_\_ (1) Original will (and codicils);
- \_\_\_\_\_ (2) Original trust instruments (and amendments) created by the decedent
- \_\_\_\_\_ (3) Certified death certificate.
- \_\_\_\_\_ (4) Certified death certificate of predeceased spouse (if applicable)

**B. Of secondary importance:**

- \_\_\_\_\_ (1) Federal and state income tax returns for the past two years;
- \_\_\_\_\_ (2) All previously filed gift tax returns, if any;
- \_\_\_\_\_ (3) Copies of passbooks or statements for all bank accounts and term certificates in which decedent has an interest, individually, as joint owner, "trustee," or otherwise closest to date of death;
- \_\_\_\_\_ (4) Account statement of all stocks, bonds, and other securities owned individually or jointly by decedent closest to date of death;
- \_\_\_\_\_ (5) Copies of brokerage statements closest to date of death;
- \_\_\_\_\_ (6) Stock option documents for outstanding options;
- \_\_\_\_\_ (7) Life insurance policies (whether or not on decedent's own life) owned by decedent;
- \_\_\_\_\_ (8) Last annual summary, if any, of death benefits provided by decedent's employer;
- \_\_\_\_\_ (9) Statement or summary, if any, of death benefits provided by prior employer(s) of decedent to which decedent is entitled;
- \_\_\_\_\_ (10) Pension or profit sharing plan statements and beneficiary designations;
- \_\_\_\_\_ (11) Individual retirement account (IRA) statements and beneficiary designations;
- \_\_\_\_\_ (12) Documents concerning prior divorce or separation of decedent;
- \_\_\_\_\_ (13) Documents concerning armed services record of decedent;
- \_\_\_\_\_ (14) Copies of any will or trust agreement of which the decedent was a beneficiary;
- \_\_\_\_\_ (15) Copies of any will or trust agreement of which the decedent was a fiduciary;
- \_\_\_\_\_ (16) Any contracts, not completed prior to decedent's death, to which the decedent was a party; and
- \_\_\_\_\_ (17) Copies of deeds to real estate.