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Estate Administration Checklist

The following are some of the documents required in connection with a probate and/or estate tax matter:

_____ 1. Original certified death certificates;

_____ 2. Original Last Will and Testament;

_____ 3. Bank, broker, IRA, CD and mutual fund statements, pension information, stock and bond certificates and any other information to assist in valuing decedent's assets;

_____ 4. Funeral bill marked paid in full and any receipts for related funeral expenses, i.e. funeral luncheon, flowers, monuments, church fees, clergy fees, etc.;

_____ 5. Bills indicating any debts or liabilities of decedent;

_____ 6. Bills and cancelled checks regarding expenses paid by the estate such as maintenance of the decedent's house, payment of property taxes, repairs, etc.;

_____ 7. Real estate appraisal from by a certified appraiser for any real property owned by decedent;

_____ 8. Copy of the proceeds check from the life insurance policy and 712 form;

_____ 9. Copies of deeds and mortgages;

_____ 10. Copies of the past three years of decedent's Individual Income Tax Returns; and

_____ 11. Copies of any Federal and New York State Gift Tax Returns filed.