Probate/Trust Administration Checklist

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This checklist is designed to help individuals and family members collect information and documentation to prepare for the administration of an estate. The estate's Executor or Trustee should begin collecting this information as soon as practical. If the Executor/Trustee intends to hire a lawyer to assist them, the lawyer will need originals (and in some cases copies) of these documents. We encourage potential clients to bring all legal paperwork, proof of ownership paperwork, and other documents mentioned in this checklist to the first appointment.

The checklist is not exhaustive, it is not intended nor should it be considered legal advice, and it is in no way a substitute for speaking with an attorney. Use this checklist as a guide and a discovery tool to help you when speaking with an attorney.

1. Did the Decedent have a Will (Last Will & Testament)? Yes ☐ No ☐
   (If yes, secure the original and any codicils)
2. Did the Decedent have a Trust? Yes ☐ No ☐
   (If yes, secure the original, including any amendments)
3. Are you the named Executor or Trustee? Yes ☐ No ☐
4. Personal Representative (aka Executor) and/or Trustee Information:

Legal Name	Phone #	Address	Date of Birth	Social Security #

5. Decedent's Information:

Legal Name	Address	County	Date of Death	Date of Birth	Marital Status	Social Security #

6. Was the Decedent married, or a widow, at the time of his/her death? If yes, complete the following information for the spouse.

Legal Name	Phone #	Address	Date of Birth	Social Security #

7. Did the Decedent have children (natural or adopted)? If yes, complete the following information for each child:

Legal Name	Phone #	Address	Date of Birth	Minor (Y/N)	Social Security #

8. Did the Decedent name other beneficiaries, not their children, in their Will or Trust? If yes, complete the following information for each beneficiary:
   Note: if the beneficiary is a legal entity, i.e. a non-profit, replace Social Security # with the Federal Employer Identification Number for that entity.
   If Decedent had no spouse, no children, and/or died intestate, without a will, please list other family members here.

Legal Name	Phone #	Address	Date of Birth	Minor (Y/N)	Social Security #

9. Have you applied for, or received, the Decedent's death certificate? Yes ☐ No ☐
(If yes, we recommend securing multiple originals)

10. Questions about the Estate and assets expected to be distributed:

    a. Did the Decedent own Real Property (Land/Home)? Yes ☐ No ☐
    (If yes, secure a copy of the current deed on all properties)

    b. Did the Decedent own motor vehicles or other titled assets? Yes ☐ No ☐
    (If yes, secure a copy of the titles for all such assets)

    c. Did the Decedent own financial accounts, banks accounts, or other similar type property? Yes ☐ No ☐
    (If yes, secure account information)

11. What is the estimated value of the Estate? Above $40,000.00 Below $40,000.00
(circle one)

12. Summary of Debts:

Name of Creditor	Account # (if known)	Amount of Liability

Remember, this checklist is not exhaustive and is a starting point for the conversation you will have with your attorney. If you are not sure about an answer, circle it and make it a topic of conversation with your advisors.

Respectfully,

Scott M. Welch, J.D.
Welch Law LLC