

# 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

**NAME OF DECEDENT:** \_\_\_\_\_

**ADDRESS:** \_\_\_\_\_

**DATE OF DEATH:** \_\_\_\_\_ **DATE OF BIRTH** \_\_\_\_\_ **AGE:** \_\_\_\_\_

**SOC. SEC. NO.:** \_\_\_\_\_ **MARITAL STATUS:** \_\_\_\_\_

**COUNTY OF RESIDENCE:** \_\_\_\_\_

Personal Representative / Executor / Trustee Information (if any)		
Name:	Phone #	Date of Birth
Address:		Social Security #

The information contained in this paper is for general information purposes only. It is not legal advice, nor does your viewing it create an attorney-client relationship with Scott Welch or Welch Law LLC.

1. 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	Social Security #	Date of Birth

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

Legal Name	Phone #	
Address	Social Security #	Date of Birth

Email Address:		
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Legal Name	Phone #	
Address	Social Security #	Date of Birth

Email Address:		
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Legal Name	Phone #	
Address	Social Security #	Date of Birth

Email Address:		
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Legal Name	Phone #	
Address	Social Security #	Date of Birth

Email Address:		
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Legal Name	Phone #	
Address	Social Security #	Date of Birth

Email Address:		
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3. 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.

(1) Legal Name	Phone #	
Address	Social Security #	Date of Birth
(2) Legal Name	Phone #	
Address	Social Security #	Date of Birth
(3) Legal Name	Phone #	
Address	Social Security #	Date of Birth

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

5. 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)

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

7. Summary of Debts:

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

8. Summary of Assets (i.e. bank accounts, life insurance policy, vehicles, property, etc.) :

Name of Asset	Account # (if known)	Value

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