



STEELE LAW FIRM

PROBATE | ESTATE PLANNING

This simple guide is designed to help you keep track of the documentation you will need during the probate process:

1. The original Will, if any.
2. The full name, date of birth, date of death, marital status/history, and address at date of death of the decedent(s).

3. The name, address, phone number, date of birth for spouse and each of the decedent's children, including date of death of any deceased child(ren).

4. Are there any special needs children or grandchildren? Please list.

5. List all checking, savings and other bank accounts. Include name(s) on each account, account number, and balance as of date of death.

**We are ready to assist you in the succession process.
Please call 770-693-2426 to schedule a consultation.**

6. List all other investments owned by decedent, or by decedent and decedent's spouse, including mutual funds, stocks, bonds, brokerage accounts, etc. Include name(s) on each account, account number, and balance as of date of death.

7. Identify each titled vehicle owned by decedent or decedent and spouse. Include make, model, VIN, and how titled.

8. Identify each piece of real estate owned by decedent or decedent and decedent's spouse. Provide a copy of Warranty Deed or Quitclaim Deed showing current owners(s), most recent property tax bill, fair market value as of date of death, and amount of mortgage, if any.

9. List all other assets owned by decedent, or by decedent and spouse in community, on the date of death.

10. Does the decedent have any pending litigation/personal injury claims or lawsuits? YES/NO

What questions do you have for the attorney?



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