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**Documents and Information to Be Brought by Client to Initial Meeting  
for a Probate Administration Matter**

The following items are documents and information that are either required or helpful in the administration of a probate estate. The more information and documents you can provide, the more efficient the estate can be opened and administered, which saves time and legal fees. If you do not have some of the documents or information at this point, do not be overly concerned and certainly do not let it prevent you from making and attending your initial meeting. We can obtain some of the information later, but it is important to get the estate opened as soon as reasonably possible so the personal representative can be appointed by the probate court.

- Three certified copies of the **death certificate** or as many as necessary for transferring assets.
- **Legal documents**: copy of the decedent's birth certificate, last will, codicils, trusts, handwritten/typed lists of personal property, prenuptial/marital agreements, deeds, land contracts, title to automobiles, boats, etc., child support orders, life insurance policies, beneficiary designations, buy/sell agreements, operating agreements, contracts/notes, and any other document you feel may be legally relevant.
- **Financial documents**: any information available describing the decedent's assets and liabilities, such as bills, bank statements, investment reports, income tax returns, real estate documents, copies of bonds, stocks, mortgages, corporate financials, business records, the decedent's check register, and similar documents.
- **Names and addresses of the following**: (1) decedent's spouse, if any, and surviving children, and children of deceased children, if any; (2) if no surviving spouse, children, grandchildren, then to decedent's surviving parents; (3) if no surviving parents, then to brothers and sisters of decedent and the children of deceased brothers and sisters. If any of the individuals are minors (below the age of 18), please indicate so and provide dates of birth.