



In order to provide proper counsel, we ask that you take a few moments to complete our Estate and Trust Administration Organizer. All information disclosed on this Organizer will be held in the strictest confidence and will not be disclosed to any third party without your consent.

**Your Personal Information**

Full Legal Name \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
Home Phone \_\_\_\_\_ Cell Phone \_\_\_\_\_  
Email Address \_\_\_\_\_ Social Security No. \_\_\_\_\_  
Employer \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
Business Phone \_\_\_\_\_ Business Fax \_\_\_\_\_

**Personal Information of Decedent**

Full Legal Name \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
Social Security No. \_\_\_\_\_  
Decedent's Marital Status \_\_\_\_\_

**Personal Information of Surviving Spouse, if any**

Full Legal Name \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
Social Security No. \_\_\_\_\_

**Decedent's Children (by Birth or Adoption)**

Name	Address	Birth Date
_____	_____	_____
_____	_____	_____
_____	_____	_____

**Decedent's Advisors**

Accountant \_\_\_\_\_ Phone \_\_\_\_\_  
Financial Advisor \_\_\_\_\_ Phone \_\_\_\_\_  
Insurance Agent \_\_\_\_\_ Phone \_\_\_\_\_

## **Additional Documentation**

If possible, we would appreciate you bringing to our initial meeting the following documentation:

### General Document Request

1. Several certified copies of decedent's death certificate.
2. All wills or codicils signed by decedent (or, if the original documents are unavailable, any copies and the location of the originals, if known).
3. Copies of all trusts created by or for the benefit of decedent or decedent's spouse and any recent accounting or valuation of each trust.
4. Any written agreements entered into between decedent and decedent's surviving spouse before (antenuptial) or after (post-nuptial) their marriage.
5. If decedent was divorced at the time of death, a copy of the divorce judgment(s) and/or property settlement agreement(s).
6. If decedent's marriage ended by death of his or her spouse, a certified copy of the predeceased spouse's death certificate and any estate tax return filed with respect to deceased spouse's estate.
7. Any agreements in force at decedent's death in which decedent was a party, including:
  - Leases
  - Partnership Agreements
  - Buy-sell Agreements
  - Employment Agreements
8. Copy of the most recent financial statement available for decedent and decedent's spouse.

### Asset Information of Decedent

1. Cash - amount and location of any cash other than in bank accounts (include cash in decedent's wallet).
2. Checking and other bank account statements for the month of death.
3. Any uncashed checks payable to decedent.
4. Any promissory notes, loans, or other debts payable to decedent.

5. Final paychecks and/or other benefits due from employer other than insurance benefits.
6. Original stock certificates and mutual fund records for the month of death (whether in decedent's name alone or in joint names).
7. Original bonds (except bearer bonds), including United States Savings Bonds and copies (or the name of issuer, face amount, interest rate, interest payment dates) of any bearer bonds.
8. Brokerage account statements for the month of death.
9. Deeds pertaining to any real estate in which decedent had any interest.
10. Any life insurance policies or certificates of group insurance, and any health and disability insurance policies or certificates in which decedent was the owner and/or insured.
11. Any life insurance policies owned by decedent on another person's life.
12. Any annuity contract owned by decedent or under which decedent was the annuitant or a beneficiary.
13. Retirement plan account statements for month of death.
14. Copies of title certificates to all vehicles registered in decedent's name or jointly in decedent's name and/or another's name.
15. List or general description and value of all personal property and household furniture/furnishings owned by decedent. Itemize only those items of significant value (\$250 or more) with the balance being included under general description.

#### Liabilities of Decedent

1. Funeral bills and expenses including all items incidental thereto. Please provide a copy of the paid funeral bill.
2. Expenses of decedent's last illness, including hospital, ambulance, medical bills.
3. Bills for recurrent monthly expenses (e.g. utility, telephone, credit card, etc.) unpaid at date of death and/or received after date of death for services rendered.
4. Promissory notes, mortgages, and security agreements payable by decedent.
5. A complete list of all other debts owed by decedent.