

Personal Representative Information (so if you are the person you need to have your information handy):

1. Name
2. Date of Birth
3. Driver's license Number (and state where issued)
4. Address
5. Home Phone Number
6. Cell Phone Number
7. Fax number
8. Email address

Information about the Deceased Person:

- 9. Decedent's Name**
10. Any other Name[s] by which decedent was known
- 11. Decedent date and place of death.**
12. Address where decedent lived at time of death. Street address, city and county
- 13. List of properties owned by decedent at death**
14. Name of Owner exactly as shown on the Grant Deed for each property
15. Property addresses and APN parcel ID numbers
- 16. Stocks, Bonds, Mutual Fund Shares, and Treasury Instruments**
 - a. For each of these types of assets you need to know:
 - 1) Name of Brokerage
 - 2) Brokerage Address
 - 3) Telephone Number
 - 4) Account Number
 - 5) Value on date of death
- 17. Bank Accounts**
 - a. For each of these types of accounts you need to know:
 - 1) Name of Institution (Bank)

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- 2) Title of the account
- 3) Bank Address
- 4) Account Number
- 5) Value on date of death

18. Personal Property, Household Items, Vehicles ETC.

- a. List All Household Furniture and Furnishings
- b. Jewelry
- c. Automobiles:
 - vi. Type / Model:
 - vii. Vehicle Identification Number (VIN):
 - viii. License Plate No.
 - ix. LEASED OWNED
 - x. Name on Registration
 - xi. If There is a Loan on This Automobile, Indicate Due Date
- d. Collections (detailed description of the items)
- e. Boats, Motorcycles, and other vehicles

19. Businesses, Partnerships, and Joint Ventures**a. CLOSELY-HELD CORPORATION:**

- vi. You should obtain balance sheet and profit and loss statements for five most recent years.
- vii. Name of Corporation
- viii. Address
- ix. Percentage of Ownership:
- x. State of Incorporation
- xi. S or C Corporation?

b. PARTNERSHIP INTERESTS

- i. If there is a written partnership agreement, you need a copy. Also, a balance sheet and earnings statements for preceding five years if available.

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- i. Name of Partnership
- ii. Address of Partnership
- iii. Full Name of Owner as It Appears on Partnership Records
- iv. Manner of Ownership Interest:
 - Joint Tenancy
 - Tenants in Common
 - Community Property
 - Husband's Separate
 - Wife's Separate
- v. Nature of Partnership Interest
 - General Partner
 - Limited Partner
- vi. Amount of Original Investment
- vii. Name of General Partner
- viii. Address of General Partner
- ix. Is there an agreement for continuation of the business on the retirement, death, or disability of a partner?

20. ESTATE PLANNING DOCUMENTS

- | | |
|--------------------------|--|
| WILL | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| TRUST | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| DIVORCE DECREE(S): | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| PREMARITAL AGREEMENT(S): | <input type="checkbox"/> Yes <input type="checkbox"/> No |

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