



Prepare for California Probate Checklist

This is a list of the types of information you will need to start a California probate. This is meant as educational material and is not legal advice.

PERSONAL REPRESENTATIVE'S (PETITIONER, EXECUTOR, OR ADMINISTRATOR) INFORMATION

Name, Driver's License Number, Address, Home Phone Number, Cell Phone Number, Email Address

INFORMATION ABOUT DECEDENT

Decedent's Name and any other name[s] by which decedent was known, Date of Death and Place of Death. Street Address, City and County of decedent's residence at time of death

REAL ESTATE

For all California property, the following information about all real property (including timeshares, rental property or farmland) the decedent owned at the time he or she died, will be needed:
Property Address and/or Assessor's Parcel Number

MARKETABLE SECURITIES (STOCKS, BONDS, MUTUAL FUND SHARES, TREASURY INSTRUMENTS)

Name of Brokerage and Estimated Value

BANK ACCOUNTS

Name of Institution and Estimated Value

PERSONAL, HOUSEHOLD PROPERTY ETC.

A list of all personal property of significant value, including, for example, Antiques, Artwork, Jewelry, Household Furniture and Furnishings including any Collections (such as Art, Stamps, Coins, Guns)

FOR EACH AUTOMOBILE MOTORCYCLE, BOAT, ETC.

Type / Model and Name on Registration

BUSINESSES, PARTNERSHIPS, AND JOINT VENTURES

For all businesses and partnerships in which the decedent owned an interest, please supply the name of the Business or Corporation.

ESTATE PLANNING DOCUMENTS

WILL Yes No

TRUST Yes No

OTHER DOCUMENTS

DIVORCE DECREE Yes No

PREMARITAL AGREEMENTS Yes No

NOTICE LIST

List of the names, relationships, ages, and addresses of all persons named in the decedent's estate planning documents and all people within two degrees of relation to the decedent (i.e. grandparents, parents, siblings, children, and grandchildren)

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