

**ESTATE - INFORMATION SHEET**

Name of Decedent \_\_\_\_\_ Date of Death: \_\_\_\_\_  
Address \_\_\_\_\_  
SSN: \_\_\_\_\_

**Original Will must be filed with Circuit Clerk**  
**Need Certified copy of Death Certificate:**

Petitioner: (Executor/Administrator) \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_  
SSN: \_\_\_\_\_  
Drivers License: \_\_\_\_\_

Approximate Value of  
Personal Property \$ \_\_\_\_\_  
Real Estate \$ \_\_\_\_\_  
(Bond determined at 1 1/2 X Personal Estate )

**Information RE: HEIRSHIP:**

- The Decedent was/was never married.
- The Decedent was married \_\_\_\_\_ times and left \_\_\_\_\_ as the surviving spouse. With respect to previous marriages:

Name of Prior Spouse Marriage Terminated by Death or Dissolution Date  
1. \_\_\_\_\_  
2. \_\_\_\_\_  
3. \_\_\_\_\_

- No child was born or adopted by Decedent.
- The following children and no others were born to or adopted by Decedent.

**Name of Child By Spouse No. Minor-M/ Disabled-D / Adopted-A**  
**Survives Decedent-S / Predeceased Decedent-P**

1. \_\_\_\_\_ D/B: \_\_\_\_\_ SSN: \_\_\_\_\_  
Driver's Lic # \_\_\_\_\_  
Address: \_\_\_\_\_

2. \_\_\_\_\_ D/B \_\_\_\_\_ SSN: \_\_\_\_\_  
Driver's Lic # \_\_\_\_\_  
Address: \_\_\_\_\_

3. \_\_\_\_\_ D/B \_\_\_\_\_ SSN: \_\_\_\_\_  
\_\_\_\_\_  
Address: \_\_\_\_\_ Driver's Lic # \_\_\_\_\_

4. \_\_\_\_\_ D/B \_\_\_\_\_ SSN: \_\_\_\_\_  
\_\_\_\_\_  
Address: \_\_\_\_\_ Driver's Lic # \_\_\_\_\_

**Proof of Heirship Information:**

Following is information with respect to children who predeceased decedent.

**Name of Deceased Child    Name of each child of deceased child    Minor-M/Adopted-A Disabled-D  
Predeceased Decedent-P**

- 1.
- 2.
- 3.
- 4.

The Decedent's father \_\_\_\_\_ survived / predeceased Decedent and he was married \_\_\_\_\_ time(s) to the following spouses: \_\_\_\_\_, and the following children were born to or adopted by decedent's father:

**Name of Child    By Spouse No.    Minor-M /Disabled-D/ Adopted-A/ Survives Decedent-S  
Predeceased Decedent-P**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

The Decedent's mother \_\_\_\_\_ survived / predeceased Decedent and she was married \_\_\_\_\_ time(s) to the following spouses: \_\_\_\_\_, and the following children were born to or adopted by decedent's mother:

**Name of Child    By Spouse No.    Minor-M /Disabled-D/ Adopted-A/ Survives Decedent-S  
Predeceased Decedent-P**

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

An Addendum is attached for additional information identifying heirs and legatees.

NOTES:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

**Need Itemized list of all bank accounts, certificates of deposit, real estate titles, stocks, mutuals, bonds, retirement, pension, insurance, 401K, profit sharing, trusts, identifying account numbers, location, approximate value, and how title or interest is held in each assets to file an Inventory.**

Checklist - THINGS TO DO :

1. Locate decedent's original Will deliver to Attorney. Determine that the Will was properly executed. The original Will must be filed with the Circuit Court of County where decedent died.
2. Obtain a number of certified Death Certificates.
3. Determine what real estate was owned by the decedent and take all steps necessary to be sure that it is secure against freezing pipes, malicious mischief, and other hazards.
4. Ascertain what chattel property was owned by the decedent, and anything necessary to be sure that it is secure against losses.
5. Obtain insurance policies of the decedent and determine whether there is adequate insurance against normally insurable risks, including public liability. Note all expiration dates which may occur before the executor can qualify and take steps to assure the continuation of the insurance.

6. Notify the insurance companies of the death and transfer the insurance to the name of the estate, or to a beneficiary if the transfer will become effective immediately.
7. Check to determine whether there is a clause which voids insurance on real estate if it is vacant, and make arrangements, where necessary to permit its being vacant until it can be sold or transferred.
8. Make a prompt search of decedent's premises to determine whether on hand were such valuables as cash, securities, passbooks, certificates of deposit, jewelry or art objects which may be subject to theft. Place them in some form of safekeeping until the executor can take control.
9. Make arrangements for the payment of wages for household help, nurses and employees of the sole proprietorship owned by the decedent.
10. Arrange to release sufficient cash funds to take care of needs until the executor has qualified.
11. Obtain the names, addresses, birth dates, social security numbers, and ages of all heirs, legatees and devisees and determine which are competent, or are minors or in the military service.
12. Determine whether there is a copy of any antenuptial agreement signed by the testator and ascertain the rights of the surviving spouse.
13. Make a complete detailed inventory of all of decedent's real and personal estate, with complete descriptions and location of each asset. Obtain copy of a deed, real estate tax bill, survey, and owner's title insurance policy.
14. Make a complete detailed list of all of decedent's creditors and their addresses (Phone numbers & Fax Numbers), together with amounts, due dates, security, liens, account numbers, etc.
15. Determine with any persons have any valid or possible claims against the estate that may have to be defended.
16. Prepare a list of names, addresses, telephone numbers of decedent's advisors, including lawyer, accountant, tax advisor, banker, insurance agent, etc.

17. Obtain all details of decedent's interest in any closely held corporation.
18. Determine whether decedent was a partner in any general or limited partnership or involved in any joint venture, and if so, get all details and copies of all agreements.
19. Determine whether there is property in another state which will require the appointment of an ancillary administrator, and, if so, make arrangements for his appointment.
20. Notify the postmaster to whom the decedent's mail is to be forwarded. Notify all sources of his mail that he is now deceased, and give new addresses on any matters that should be turned over to someone other than the representative or surviving spouse.
21. Check with decedent's employer to determine whether there are any unpaid wages, salary, profit sharing, life insurance or bonus. Also determine the exact status of all company benefits that may be payable to the estate or some other beneficiary.
22. Make careful inventory of the decedent's residence. Go through everything with great care to find important documents, currency, securities, etc, that may be hidden in a "safe place".
23. If the chattel property was not bequeathed and is not needed or wanted by a member of his family, arrange to have it sold at auction or to a dealer. Be sure to get prior court authority for the sale if the will does not grant that authority.
24. If the decedent's residence will not be occupied by any member of the family, have utilities and the telephone terminated, and obtain refund of any deposit that was left with any utility company, but be sure that heat is available if there is a danger that pipes will freeze.
25. Notify all companies where decedent had a charge account or a charge plate. Obtain and destroy all charge plates.
26. Obtain a complete list of all checking and savings accounts, certificates of deposit, stocks and bonds and other securities.
27. Check the decedent's correspondence and records to determine the names of all stock brokers with whom business has been done in recent years. Contact each to determine what accounts are open, what transactions are pending, and requisites for liquidating that asset.
28. Liquidate all margin accounts as soon as possible. Close all open accounts or transfer

them into the name of the estate. Obtain possession of all securities held by brokers. Cancel pending buy and sell orders. Review any stop loss orders.

29. Check decedent's income tax return to be sure that all investments formerly owned have been accounted for. Check all 1099 forms recently received to be sure that the investment is recovered, or its disposition before death is established.
30. Where there will be any delay in closing out accounts or selling or transferring securities, notify the agency making payments or dividends or interest of the name and employer's identification number of the estate.
31. Arrange to sell all securities not specifically bequeathed unless the will directs their retention, or their distribution in kind. If the stock market is depressed, obtain permission from the beneficiaries to retain the securities for some specified period.
32. Go through the decedent's personal papers, correspondence, invoices, etc. Destroy all those which have no value. Arrange to file and store those which contain important information or which may have intrinsic value. Place into the inventory all such items that have value.
33. Check the funeral bill. If the amount is proper in the light of the size of the estate, arrange to pay it in time to take any discount. If it appears excessive, demand the filing of a claim and have it set for hearing.
34. Make claim with the Social Security Office for any burial benefits, where applicable and assist the surviving spouse or dependents to make claim for widow's and survivors' benefits.
35. Contact all local agents, or the home office where there is no local agent, to obtain Proof of Death forms for each life insurance policy. This is mandatory if the estate is a beneficiary and is a service the local agent or home office frequently performed as a courtesy even when there are named beneficiaries.