

Probate Documentation Needed

1. Two Certified Copies of the Death Certificate
2. Legal documents:
 - Original Will or Trust Agreement
 - Any Marital Agreement
 - Anything Indicating a Beneficiary Designations
 - Business Documents
 - Real Estate Deeds
 - Vehicle Titles
3. Financial documents:
 - Bank Statements
 - Investment Account Statements
 - Retirement Statement
 - IRA/401k Statements
 - Life Insurance Information
 - Stocks or Bonds
 - Mortgage Statement
 - Most Recent Tax Return
 - Property Tax Bill
 - Credit Card Statements
 - Utility Bills