

# Items to Bring with You or To Have Knowledge About For the Estate Processing Appointment

The consultation is an opportunity for you to provide us with enough information to help you navigate the estate processing (small estate probate, prepare for probate, trust administration).

You do not have to bring any documents with you to the appointment; however, having the following information with you OR accessible to you may help streamline the appointment saving you time and money. We look forward to meeting with you.

This consultation is billed at \$150.00 per hour. Legal document preparation fees are billed separately.

1.	<b>Decedent's Demographic information</b> (name, date of birth, current address, phone numbers)
2.	<b>Decedent's Spouse Demographic information</b> (name, date of birth, current address, phone numbers)
3.	<b>Decedent's Children and grandchildren information</b> (name, date of birth, date of death – if applicable, current address, phone numbers)
4.	<b>If no children or grandchildren, other heirs' information</b> (name, date of birth, date of death – if applicable, current address, phone numbers – parents, grandparents, grandparent's descendants)
5.	<b>Information about legal documents Decedent already had</b> (trusts (owner or beneficiary), Wills, agreements, child support, QDROs, etc.). Please bring to the appointment.
6.	<b>Decedent's Assets</b> (type of asset, value of assets, debt on assets) (example: financial accounts, investments, retirement accounts, annuities, life insurance, burial insurance, burial plans, businesses, property, vehicles, personal property, collections, art, jewelry, etc.)
7.	<b>Decedent's Income</b> (type of income, amount received, how often received) (example: Social Security, government pensions, retirement pensions, annuities, rental income, earned income, monies still due to decedent, etc.)
8.	<b>Decedent's Expenses</b> (types, amounts paid, frequency of payments) (example: rent, utilities, donations, medical expenses, medical insurance coverage, etc.)
9.	<b>Decedent's Debts</b> (types, amounts paid, frequency of payments) (example: mortgage, tax liens, auto financing, credit cards, etc.)
10.	<b>Military service</b> (dates of service, whether service was during wartime, honorable discharge)

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