



A Family Member Died, Now What? Preparing for the Initial Meeting with the Attorney

By [David A. Zobel](#)

In our recent post "[A Family Member Died, Now What? How to Begin Winding up a Relative's Legal Affairs,](#)" we outlined several actions to take to start winding up a deceased relative's legal affairs, including gathering your relative's estate-planning documents and taking a preliminary accounting of your relative's property.

Below is a general checklist of information and documents which will be helpful for you to assemble in preparation for meeting with your attorney. It is not necessary to have the checklist completed prior to the initial meeting. However, for reference, you may want to print this post, fill it out, and bring it with you to the initial meeting.

1. Decedent's Background Information (may attach a death certificate in lieu of this section):

- Full Name: _____
- Residence Address: _____
- Date of Birth: _____
- Social Security Number: _____
- Marital Status: _____
- Spouse's Name: _____

2. Relative's Financial and Medical Affairs:

- Employment Status: _____
- Employer's Name: _____
- Banks / Institutions / Brokerages (including accounts held, e.g. savings):

- Safe Deposit Box Location: _____
- Pension (if so, from where): _____
- Life Insurance Policies (provider(s) and amounts):

_____	_____
_____	_____
_____	_____
_____	_____

- Vehicles and VINs:

_____	_____
_____	_____
_____	_____
_____	_____

- Known Creditors (mortgage, credit card, etc.):

- Receiving Medicaid Benefits? _____



• Receiving Social Security Benefits? _____

• Important Notes / Special Circumstances to Tell Attorney:

3. **Documents to Assemble** (If you don't have access to an account, just indicate that below):

_____ *Certified* death certificate

_____ *Copy* of death certificate of spouse, if widowed

_____ *Original* last will and testament and any codicils (amendments to the will)

_____ *Copy* of trust and any amendments

_____ *Copy* of all bank statements from accounts titled in relative's name from month of relative's death

_____ *Copy* of all brokerage statements from accounts titled in relative's name from month of relative's death

_____ *Copy* of all bank statements in the name of the trust for the month of death

_____ *Copy* of all brokerage statements in the name of the trust for the month of death

_____ *Copy* of all retirement account statements in the name of the relative for the month of death

_____ *Original* life insurance policies

_____ Death certificates for any predeceased owners or beneficiaries of insurance policies or co-owners of financial accounts

_____ *Original* vehicle titles (including boats, motors, and trailers) in the name of the relative and trust

_____ *Copy* of titles for any real property in the name of the relative or the trust

_____ List of extraordinary personal property (paintings, expensive jewelry, etc.)

_____ *Original* savings bonds

_____ Information on safe deposit box



- _____ Information regarding any creditors of the relative (accounts, balances)
- _____ Information regarding any Medicaid benefits the relative received
- _____ Information regarding the relative's beneficiaries/heirs (addresses, dates of birth and social security numbers)
- _____ Information on any long term care policies
- _____ Copy of funeral bill

[David A. Zobel](#) is a member of Danna McKitrick's team of estate planning and probate professionals. If you would like to learn more about the considerations above, would like assistance administrating a relative's estate or help with you estate planning needs, one of our firm's experienced attorneys would love to meet with you.

