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Probate Checklist for your Initial Appointment

For our office to confirm your initial Probate consultation, we must have the below information and documentation. Many of these requirements are imposed by the Probate Courts or otherwise required by the Probate Code. If you are unable to obtain the below information or documentation for some reason, please notify us.

☐ **Completed Probate Questionnaire**

☐ **Proposed Personal Representative's Driver License**
- Copy

☐ **Decedent's Death Certificate**
- 3 Certified Copies
- Without cause of death, if available (aka "Short Form")

☐ **Decedent's Last Will & Testament**
- Original

☐ **Codicils to Decedent's Last Will & Testament**
- Original

☐ **Real Estate Deed(s)**
- Copies

☐ **Statements for all Financial Assets, Bank Accounts, Annuities, etc.**
- Showing Date of Death Value

☐ **Bills/Statements/Invoices for all Creditors**
- Most Recent