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Trust Checklist for your Initial Appointment

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

☐ **Completed Trustee Questionnaire**

☐ **Proposed Trustee's Driver License**
- Copy

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

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

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

☐ **Decedent's Trust Agreement**
- Original

☐ **Amendments to Decedent's Trust Agreement**
- 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