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MEMORANDUM:

TO: OUR CLIENTS

RE: NEW ESTATE

When you come to our office for your initial consultation regarding an estate, please bring the following with you:

1. Full Name of deceased: _____
2. Address of deceased: _____
City _____, State _____, Zip Code _____
3. Date of Death: _____
4. Social Security Number of deceased: _____
5. Full Name of surviving spouse: _____
6. Residence Address: _____
City _____, State _____, Zip Code _____
7. Mailing Address if different: _____
8. Telephone Number: _____
9. Social Security Number: _____
10. Date and Place of Marriage: _____
11. Original Last Will and Testament of deceased, Original of Codicil (s) to Last Will and Testament
12. Social Security Number of Executor/Administrator: _____

13. Mailing Address of Executor/Administrator: _____
City _____, State _____, Zip Code _____
14. Telephone Number: _____
15. Names and Addresses of all beneficiaries of estate
15. Death Certificate
17. Information on any IRA accounts owned by deceased
18. Bank Statements on all accounts owned by deceased, jointly and solely owned
19. Certificates of Deposit
20. Statements on any investment accounts
21. Stock Certificates
22. Savings Bonds owned
23. Insurance Policies
24. Deeds to all real estate owned by the deceased, jointly and solely owned
25. Vehicle Titles
26. Safe Deposit Box information and key