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MEMORANDUM:

TO: OUR CLIENTS

Today's Date: _____

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. Name of Executor/Administrator: _____
 - a. Social Security Number of Exec./Admin. _____

13. Mailing Address of Exec/Admin. _____

City _____, State _____, Zip Code _____

14. Executor/Administrator Telephone Number: _____

a. Email Address: _____

15. Names and Addresses of all beneficiaries of estate

a. _____

b. _____

c. _____

d. _____

16. 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