

ESTATE DOCUMENTS CHECKLIST

PLEASE PROVIDE THE FOLLOWING WITH THE ESTATE ORGANIZER

- Certified death certificates (2 or 3)
- COMPLETED ESTATE ORGANIZER**
- Original Will and other legal documents, including trusts created by the deceased, or in which the deceased had an interest, or for which the decedent was trustee
- List of the deceased's assets
- Current bank, brokerage, IRA and 401K account statements
 - Up to or including date of death
 - Including statements for jointly held accounts. Note if joint owner other than deceased made any contribution to the account.
- Information regarding any Uniform Transfers to Minors Act (UTMA) or Uniform Gifts to Minors Act (UGMA) accounts of which the deceased was custodian for a minor beneficiary
- Designated beneficiary forms for IRA, 401K or other retirement accounts
- Copies of the deceased's income tax returns for the 3 years prior to death, including income tax returns for deceased's business (corporate, partnership, LLC, etc.)
- Copies of all gift tax returns filed by the deceased
- Original life insurance policies and related information
- Original annuity contracts and related information
- Information regarding safe deposit box and inventory of contents
- List of debts or expenses incurred during deceased's life which are payable/paid after death, including funeral expenses, and copies of statements, receipts, invoices, etc.
- List of debts owed to the deceased by others
- Copies of stock certificates and/or bonds
- Information regarding partnerships or corporations in which deceased had an interest, including copies of partnership, operating or buy-sell agreements
- Copies of deeds for real estate in which deceased had an interest
- Copies of leases under which deceased was landlord or tenant
- Information regarding MassHealth or Medicaid benefits received by the deceased
- Estate tax return (Form 706 and/or M-706) for estate of predeceased spouse, if applicable
- Copy of title to deceased's automobile(s), or registration if title not available