

ESTATE ORGANIZER

This organizer is provided to assist you, the fiduciary (Executor/Administrator), in gathering the information we need for the preparation of various documents required for the administration of the Estate of _____.
Please complete the organizer and provide documentation and information as requested.

We look forward to providing services to you. Should you have any questions regarding any items please do not hesitate to contact us.

DECEDENT

Full Name: _____

Social Security number: _____ Date of birth: _____ Date of death: _____

Occupation (former occupation if retired): _____

Legal residence at date of death (city, county, state and ZIP): _____

_____ Date domicile established: _____

SPOUSE

Full Name: _____

Divorced Date of Divorce: _____ *Provide copy of Divorce Decree*

Deceased Date of Death: _____ *Provide copy of death certificate*

FIDUCIARY

Full Name: _____

Address : _____

Email address: _____ SSN/EIN: _____

Phone: _____ Fax: _____

ADVISORS

Accountant's name, address and telephone number _____

Investment Advisor's name, address and telephone number: _____

Insurance agent's name, address and telephone number: _____

(Please feel free to attach additional sheets and/or documentation)

DISTRIBUTEES

Name	Address	Relationship to Decedent	SSN	Date of Birth

BENEFICIARIES

Name	Address	Relationship to Decedent	SSN/EIN	Date of Birth

(Please feel free to attach additional sheets and/or documentation)

DOCUMENTS/INFORMATION TO PROVIDE

(only photocopies are needed unless original document specified)

- Original Last Will & Testament and any Codicils
- Original Trust(s)
- Gift Tax Returns
- Last three years' tax returns (personal/1040 and any Trust returns/1041)
- Prenuptial/Postnuptial Agreements
- Business Agreement and business appraisal
- Title to vehicles
- Stock certificates
- Savings bonds
- Death certificates for pre-deceased distributees
- Statements for all accounts, IRAs, CDs, etc (whether held individually or jointly with others)
- Joint asset holder information (name, address and telephone number)
- Real property: Deed Title report Appraisal Tax bill Rental information
- Notes and Mortgages
- Annuities and retirement benefits (include beneficiary designations)
- Life insurance policy(s) and beneficiary designations for same
- Safe deposit box information (location, name of any joint owner, list of contents)
- Estate tax return for predeceased spouse
- Power-of-Attorney
- Employment benefit agreements
- Details of expected inheritance
- Details of litigation
- Tangible personal property and/or collections information (provide list with appraisals, if any)
- Expenses (provide copy of statements/receipts for funeral, memorial reception, clergy, flowers, accountant, etc.)
- Debts (provide copy of statements/receipts for credit cards, utilities, Notes, etc.)

NOTES

(Please provide any additional information, questions, comments or concerns)