



The Law Offices of
Nathan L. Townsend, P.A.

Nathan L. Townsend, LLM
9385 North 56th Street, Suite 202
Tampa, Florida 33617
Phone: 813.988.5500
Toll Free: 866.988.5999
Fax: 813.988.5510

Probate Checklist

A loved one has recently passed away, and you are unsure what the next step is in resolving the individual's estate. Here are 16 questions which you will need to know the answer to prior to consulting with a probate attorney.

1. Did the decedent have a Last Will and Testament?
2. Where is the original of the Last Will and Testament?
3. Did the decedent have a trust?
4. Where is the original of the trust?
5. Who has the original death certificates?
6. Who has a copy of the paid funeral bill?
7. Did the decedent own any assets in their individual name?
8. Did the decedent own real property (i.e. Land) in another state?
9. Was the decedent survived by a spouse?
10. Was the decedent survived by minor children?
11. Did the decedent have any life insurance policies?
12. Did the decedent have any qualified accounts (i.e. IRA accounts, 401(k) accounts or 403(b) accounts)?
13. Who are the beneficiaries of the life insurance policies, IRA accounts, 401(k) accounts or 403(b) accounts?
14. Was the decedent receiving Medicare / Medicaid?
15. Was the decedent the owner of a small business?
16. Did the decedent have a safe deposit box? If so, where is the key?

Important Information and Documentation to Gather:

1. Original Last Will and Testament, Trust and Death Certificates.
2. The names, addresses and ages of all of the decedent's immediate family.
3. A copy of the decedent's most recent income tax return.
4. A list of all of the decedent's current assets, and copies of any documentation regarding the current assets.
5. A copy of the paid funeral bill.