



# GILK LEGACY LAW<sub>PLLC</sub>

ESTATE & PROPERTY PLANNING FOR BUSINESSES, FARMS & PEOPLE

## What to bring to your first meeting after your loved one dies:

- Original Last Will and Testament, even if main plan is a Revocable Living Trust (RLT).
- Original signed RLT.
- Asset transfer confirmations or trust funding confirmations if RLT plan.
- Abstracts for all real estate in which decedent had an interest, regardless of whether there was a joint owner or a Transfer on Death designation.
- Current real estate tax statements.
- Copies of recorded current contracts for deed and amortization schedules.
- Bank accounts & CDs, regardless of whether there was a beneficiary designation:
  - statements for all accounts of which decedent was an owner.
  - in lieu of statements, a printout from the bank listing all accounts, account numbers and how titled.
- Investment accounts, regardless of whether there was a beneficiary designation:
  - statements for all accounts of which decedent was an owner
  - in lieu of statements, a printout from the brokerage house listing all accounts, account numbers and how titled.
- Retirement assets statements (IRAs, 401Ks, pensions, etc.), regardless of who is named beneficiary.
- Annuity statements, regardless of who is named beneficiary.
- Life insurance policies and statements, regardless of who is named beneficiary.
- List of US savings bonds. Bring original bonds if you have originals.
- List of co-ops with which decedent did business during lifetime, even if you think all equities, capital credits and dividends have already been paid out.
- Originals or photocopies of vehicle titles in decedent's name (vehicles, boats, trailers, motorcycles, snowmobiles, etc.).
- List of all grain on hand and where stored.

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- List of acres of growing crops, and how many acres of each crop type.
- Copies of any Farm Leases.
- List of estimated value of livestock, along with number of each animal type.
- Original share certificates for ethanol plants, etc.
- List of outstanding loans and debts, and creditors' names and addresses
- Corporate record books for any closely held entity (LLC, corporation, partnership, etc.) in which decedent was an owner.
- List of any monies other people owed decedent and copies of written promissory notes.
- List of names, addresses, phone numbers, email addresses, and social security numbers for surviving spouse, children, and all heirs.
- Name, social security number and date of death of any predeceased spouse(s).
- Death Certificates
  - two original certificates for your recently deceased loved one.
  - one original certificate for any predeceased spouse(s).
- Addresses and phone numbers of any charitable beneficiaries.
- Copies of any Irrevocable Life Insurance Trust(s) and past Crummey notices, and statements on life insurance policies the Trust(s) holds.
- Name, address and phone number of funeral home, and a copy of the funeral home bill if you have it.