

Probate –Decedent Had a Will
Items to Bring to Initial Interview

In addition to the completed Client Information Form, please provide:

- Decedent's Last Will and Testament (Original, not a Copy)
- All Codicils (Amendments to Will)
- Trust documents and all amendments
- Surviving Spouse's Last Will and Testament, Codicils, and Trust Documents
- Death Certificate
- Obituary Notice
- Applicant's Driver's License and Social Security Card
- Decedent's Driver's License and Social Security Card

- A completed Asset Questionnaire (Additional information will be requested at the interview)
- A List of the Decedent's Debts

Tax Returns

- Tax Returns and supporting documents for 3 years (5 yrs if self-employed)
- Gift-tax Returns