

**Initial Checklist**

**1. Preliminary Information**

Decedent's Full name (include alias): \_\_\_\_\_

Date of Death: \_\_\_\_\_ Social Security Number: \_\_\_\_\_

Domicile: \_\_\_\_\_ Citizenship: \_\_\_\_\_

Place of Death: \_\_\_\_\_

**2. Safe Deposit Inventory.**

Did the decedent have access to a safe deposit box? \_\_\_\_Yes \_\_\_\_No

Bank location: \_\_\_\_\_  
(address)

Title under whose name? \_\_\_\_\_

**3. Last Will and Testament.**

Did the decedent leave a Will? \_\_\_\_Yes \_\_\_\_No

Where is the Will located? \_\_\_\_\_

**4. Trust.**

Did the decedent create a Trust? \_\_\_\_Yes \_\_\_\_No

What type of Trust? \_\_\_\_Revocable \_\_\_\_Irrevocable \_\_\_\_Other

Trust Date: \_\_\_\_\_ Trust Location: \_\_\_\_\_