DAN HALL & ASSOCIATES, P.C.

ATTORNEYS AT LAW

Dan J. Hall*
John K. Bishop
Michael J. Hall

PREPARATION ITEMS FOR INITIAL ESTATE ADMINISTRATION MEETING

To make our initial meeting most productive and efficient, please provide the following:

______ The original of the decedent's will (if any)

______ Originals or copies of living trust and amendments (if any)

______ Death certificates (Certified), if currently available

______ A schedule of assets and liabilities showing values and balances closest to date of death

______ Full addresses for all tracts of real property

______ Copies of deeds to real property (if readily available)

______ Monthly statements for all bank accounts (checking accounts, savings accounts, money market accounts, and CDs) for the period closest to date of death

______ Monthly statements for all non-retirement brokerage and/or mutual fund accounts for the period closest to date of death

______ Monthly statements for all retirement accounts, including 401(k), 403(b), IRAs, deferred compensation plans, Roth IRAs, etc.

______ Dates of birth and current addresses for children

______ Dates of birth and current addresses for anyone other than a child who is named as a beneficiary in the decedent's will or trust.

Please feel free to email or call if you have any questions.

A PROFESSIONAL CORPORATION

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*Certified Specialist in Estate Planning, Trust & Probate Law • By the State Bar of California Board of Legal Specialization