PROBATE CHECKLIST



ELPOLAW ESTATE PLANNING/PROBATE DIVISION

1101 College Street P.O. Box 770 Bowling Green, KY 42102-0770 270-781-6500 (P) 270-782-7782 (F) www.elpolaw.com



DECEASED

Full Legal Name			Date of Birth	
Goes By			Social Security Number	
Street Address			Date of Death	
City	State	Zip	Employer	
Gender:	☐ Male	☐ Female		
U.S. Citizen:	□ Yes	□ No		
		Single ☐ Divorced or postnuptial agree	☐ Widowed ment? ☐ Yes ☐ No	
•	ce:	No and dates of service	2	
Receiving Med	dicaid:	Yes \square No		
Will:□ Yes	□ No	Γrust: □ Yes □ N	О	
Accountant's N	ame:			
Referred By:				



PERSON(S) HANDLING ESTATE

Full Legal	Name		Date of Birth
Goes By			Social Security Number
Street Add	Iress		Phone (Cell, Home, Work)
City	State	Zip	Email Address
Gender:	Male Female Ma	rital Status: Mar	ried Single Divorced Wid
Relationsh	iip: Spouse		
	☐ Natural Child	☐ Adopted Chile	Foster Child
	☐ Natural Grandchild	☐ Adopted Gran	dchild
	Parent	Sibling	☐ Aunt or Uncle
	☐ Niece or Nephew	☐ Friend	Other
Full Legal			
Full Legal Goes By			Date of Birth Social Security Number
	Name		Date of Birth
Goes By	Name	Zip	Date of Birth Social Security Number
Goes By Street Add City	Name Iress State	Zip	Date of Birth Social Security Number Phone (Cell, Home, Work)
Goes By Street Add City Gender:	Name Iress State	Zip	Date of Birth Social Security Number Phone (Cell, Home, Work) Email Address
Goes By Street Add City Gender:	Name Iress State Male Female Ma	Zip	Date of Birth Social Security Number Phone (Cell, Home, Work) Email Address ried Single Divorced Wice
Goes By Street Add City Gender:	Name Iress State Male Female Ma iip: Spouse	Zip urital Status: ☐ Mar	Date of Birth Social Security Number Phone (Cell, Home, Work) Email Address ried Divorced Wide
Goes By Street Add City Gender:	Name Iress State Male Female Maip: Spouse Natural Child Main M	Zip urital Status: Mar	Date of Birth Social Security Number Phone (Cell, Home, Work) Email Address ried Divorced Wide



DECEASED'S HEIRS OR BENEFICIARIES

Full Legal	Name	Date of Birth		
Goes By		,	Social Security Number	
Street Add	ress		Phone	
City	State	Zip	Email Address	
Gender:□	Male Female Ma	rital Status: 🗌 Marı	ried Single Divorced Widowed	
Relationsh	ip: Spouse			
	☐ Natural Child	☐ Adopted Child	d Foster Child	
	☐ Natural Grandchild	☐ Adopted Gran	dchild	
	Parent	Sibling	Aunt or Uncle	
	☐ Niece or Nephew	Friend	Other	
Full Legal	Name		Date of Birth	
Goes By			Social Security Number	
Goes By Street Add	ress		Social Security Number Phone	
	ress	Zip		
Street Add	State	-	Phone Email Address	
Street Add	State	-	Phone Email Address	
Street Add	State Male ☐ Female Ma	-	Phone Email Address ried	
Street Add	State Male ☐ Female Ma ip: ☐ Spouse	rital Status: Marı	Phone Email Address ried Single Divorced Widowe	
Street Add	State Male ☐ Female Ma ip: ☐ Spouse ☐ Natural Child	rital Status: Mari	Phone Email Address ried Single Divorced Widowe	

DECEASED'S HEIRS OR BENEFICIARIES (continued)

Full Lega	l Name		Date of Birth
Goes By			Social Security Number
Street Add	dress		Phone
City	State	Zip	Email Address
Gender:	Male Female Ma	ırital Status: 🗌 Mar	ried Single Divorced Wide
Relationsl	hip: Spouse		
	☐ Natural Child	☐ Adopted Chile	d
	☐ Natural Grandchild	☐ Adopted Gran	ndchild
	Parent	☐ Sibling	☐ Aunt or Uncle
	☐ Niece or Nephew	Friend	Other
Full Lega	l Name		Date of Birth
Goes By Street Add			Date of Birth Social Security Number Phone
Goes By Street Add	dress	7in	Social Security Number Phone
Goes By Street Add	dress	Zip urital Status: □ Mar	Social Security Number Phone Email Address
Goes By Street Add City Gender:	dress	-	Social Security Number Phone
Goes By Street Add City Gender:	dress State] Male □ Female Ma	-	Social Security Number Phone Email Address rried Divorced Wide
Goes By Street Add City Gender:	dress State Male ☐ Female Ma hip: ☐ Spouse	urital Status: Mar	Social Security Number Phone Email Address ried Divorced Wide d Foster Child
Goes By Street Add City Gender:	dress State Male □ Female Ma hip: □ Spouse □ Natural Child	rital Status: ☐ Mar	Social Security Number Phone Email Address ried Divorced Wide d Foster Child

DECEASED'S HEIRS OR BENEFICIARIES (continued)

Full Lega	l Name	_	Date of Birth
Goes By			Social Security Number
Street Add	dress		Phone
City	State	Zip	Email Address
Gender:] Male 🗌 Female Ma	rital Status: Marrie	ed□ Single □ Divorced □ Widov
Relationsl	nip: Spouse		
	☐ Natural Child	☐ Adopted Child	☐ Foster Child
	☐ Natural Grandchild	☐ Adopted Grando	child Foster Grandchild
	Parent	Sibling	☐ Aunt or Uncle
	☐ Niece or Nephew	☐ Friend	Other
			Social Security Number
Goes By Street Add	dress		Phone
	dress	Zip	Phone Email Address
Street Add	State	•	Email Address
Street Add	State] Male □ Female Ma	•	Email Address
Street Add City Gender:	State] Male □ Female Ma	•	Email Address
Street Add City Gender:	State Male Female Manip: Spouse	rital Status: Marrie	Email Address ed
Street Add City Gender:	State Male Female Manip: Spouse Natural Child	rital Status:	Email Address ed Single Divorced Widov Foster Child

DECEASED'S HEIRS OR BENEFICIARIES (continued)

Full Legal	Name		Date of	Birth
Goes By			Social S	Security Number
Street Add	Iress		Phone	
City	State	Zip	Email A	Address
Gender:	Male Female Ma	rital Status: 🗌 Marr	ried□ Sing	gle 🗌 Divorced 🗀 Widow
Relationsh	nip: Spouse			
	☐ Natural Child	☐ Adopted Child	l	☐ Foster Child
	☐ Natural Grandchild	☐ Adopted Gran	dchild	☐ Foster Grandchild
	Parent	Sibling		Aunt or Uncle
Full Legal	☐ Niece or Nephew	☐ Friend	Date of	Other
Full Legal Goes By	· ·	☐ Friend	Date of Social S	
	Name	☐ Friend		Birth
Goes By	Name	☐ Friend Zip	Social S	Birth Security Number
Goes By Street Add	Name	Zip	Social S Phone Email A	Birth Security Number
Goes By Street Add City Gender:	Name	Zip	Social S Phone Email A	Birth Security Number
Goes By Street Add City Gender:	Name Iress State Male Female Ma	Zip	Social S Phone Email A	Birth Security Number
Goes By Street Add City Gender:	Name Iress State Male Female Ma hip: Spouse	Zip rital Status:	Social S Phone Email A	Birth Security Number Address gle Divorced Widow
Goes By Street Add City Gender:	Name Iress State Male Female Manip: Spouse Natural Child	Zip rital Status: Adopted Child	Social S Phone Email A	Birth Security Number Address gle Divorced Widow Foster Child



DECEASED'S FINANCIAL INFORMATION

1.	Home	or any ot	her rea	l estate?							
Descrip	otion			ed in whose	Purcl Pric		Currer Value		Mortgage	e (=)	Equity
2. Descrip		titled pr		(car, truck, mo	Purcl	nase	Currer	nt]	Loan	(=)	Equity
				Name	Pric		Value			·	
3.	Check	ing acco	unts, sa	vings account	s, or C	Ds?					
Name o	of instituti	on	Titled i	n whose Name		Account 1	Number	A	approx. t	oalanc	e
4.	Stocks	, bonds,	mutual	funds, or bro	kerage	account	s?				
No. of	shares	Descript	ion	Account Nur	nber	Titled Whos	in e name	Purch: pri			urrent value

DECEASED'S FINANCIAL INFORMATION (continued)

IRAs, profit	t sharing or pension plan			
otion	Titled in Whose	Titled in Whose Name		Value
Business or	partnership interest?			
of Company	Type of Company (S Corp., LLC, Partnersh			Value and Type of Interest
Life insurar of Company	Policy Owner	1 st Beneficiary	2 nd Beneficiary	Death Benefit
Owed mone	by by anyone?			
otion				
	Business or of Company Life insurar of Company Owed mone	Business or partnership interest? of Company Type of Company (S Corp., LLC, Partnersh Life insurance or annuities? of Company Policy Owner Owed money by anyone?	Business or partnership interest? of Company Type of Company Home state o (S Corp., LLC, Partnership) of Company Life insurance or annuities? of Company Policy Owner 1st Beneficiary Owed money by anyone?	Business or partnership interest? of Company Type of Company Home state of Sorp., LLC, Partnership) of Company Whose Name Life insurance or annuities? of Company Policy Owner 1st Beneficiary 2nd Beneficiary Owed money by anyone?

DECEASED'S FINANCIAL INFORMATION (continued)

9.	Special items of value (antiques, jewelry, collections, tools, farm equipment, etc.)							
	Description	Approximate Value						
10.	Total value of all of your personal property (clothes, furniture	, etc.) not accounted for above?						
		\$						
11.	Debts other than mortgage (funeral expense, medical expense home equity loans, etc.)	es, credit cards, personal loans,						
	Description	Amount Owed						

SECTION 5

DOCUMENTS TO BRING

- □ The original Last Will and Testament
- □ Any trust documents to which the deceased was a recipient or created
- □ Prenuptial or postnuptial agreement
- □ Death Certificates (if available)
- □ Deeds and/or leases to all real estate
- □ An account statement for each of the deceased's accounts (bank, brokerage, CD, IRA, 401(k), etc.)
- □ Stock certificates
- □ Information about closely held businesses
- □ Life insurance policies
- □ Vehicle title and registration documents
- □ Boat/plane title documents
- □ Retirement beneficiary forms
- □ Divorce documents (if divorced)
- □ Funeral bills
- □ Any and all other bills
- □ Any document showing what the decedent may have owed (loans, credit cards, mortgages etc.)
- □ Any documents showing who might owe the decedent (promissory notes, etc.)
- □ Any information about charitable pledges
- □ Tax returns for last three tax years

CONTACT INFORMATION FOR PROBATE ADMINISTRATION ATTORNEYS AND SUPPORT

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Further information may be accessed on our website at www.elpolaw.com