WALLACE LAW FIRM, P.C.
709 HURON AVENUE
PORT HURON, MICHIGAN 48060

MATTHEW M. WALLACE, C.P.A., J.D.
BUZZ C. SUUPPI, J.D.
www.happylaw.com
TELEPHONE (810) 985-4320
FAX (810) 985-4108

Initial Appointment Checklist
Death Administration

1. Full name and last permanent address of deceased.

2. Certified copy of Death Certificate with raised seal of deceased.

3. Estate Planning Documents of deceased and deceased's spouse, if any:
    a. Include Will(s), Codicil(s), Trust(s), Trust Amendment(s), Financial and Health Care Powers of Attorney

4. Full names of deceased's:
    a. Spouse
    b. Children
    c. Will beneficiaries and personal representatives (if other than a. or b. above)
    d. Trust beneficiaries and successor trustees (if other than a., b. or c. above)

5. For the persons named in 4. above who are living, please include current address, home, work and cell phone numbers.

6. For any of the persons named in 4. above who are deceased, please include his/her date of death and a photocopy of Death Certificate; for spouse please provide a certified copy of Death Certificate.

7. Deceased's assets as of date of death (individually, jointly and trust owned) and regardless of whether there is a beneficiary or transfer/payable-on-death designation:
    a. List of all real and personal property with approximate values and how owned/titled.
    b. Include bank accounts, annuities, vehicles, CDs, IRAs, 401(k)s, real estate, life insurance with death benefit amounts, stocks, bonds, investments, brokerage accounts, amounts loaned to others, etc.

8. Deceased's debts:
    a. List of all debts and monies owed with approximate amounts owed.
    b. Include mortgages, credit card debt, installment loans, vehicle loans, etc.