

SUCCESSION INFORMATION – ASSETS AND DEBTS

The following is a list of information that we will need to begin work on a succession. We may need more information depending on the types of assets the decedent held; this is a starting point.

REAL ESTATE

Acts of sale of real estate owned by the decedent at death

Acts of sale in which minerals were reserved by the decedent

If these are not readily available, we can obtain copies of acts of sale of real estate recorded in Terrebonne Parish or Lafourche Parish (there may be an extra charge depending on the research required). If there is real estate elsewhere, you will need to furnish us with these acts.

STOCKS AND BONDS

Brokerage account statements for the month of death

Stock certificates

Savings bonds

CASH

Bank statements that include the date of death and the following statement for all checking, savings, and money market accounts

Certificates of Deposit or statements if not reported on bank statements

MISCELLANEOUS PROPERTY

Furniture, household goods, personal effects – not necessary to itemize – we will help estimate a "ball-park" fair market value

Title or registration for all vehicles and trailers – registration is usually in the glove box

Mileage on each motor vehicle

Trim level (LS, EX, XLE, Limited, etc.) & options on each vehicle

Boats – Louisiana Wildlife & Fisheries certificate – often kept in a jar or Ziploc bag on the boat or in tackle box

OTHER ASSETS

Life insurance policies, IRAs, or annuities payable to the decedent's estate or with no valid beneficiary designation.

IF A FEDERAL ESTATE TAX RETURN MUST BE FILED

Life insurance policies on the life of the deceased person and surviving spouse

Statements received following the date of death for Qualified Retirement Plans (401k, 403b), IRAs

Annuity contracts

In some cases we will have to collect information as to the debts of the decedent and surviving spouse such as funeral expenses, medical expenses, credit card balances on date of death, first utilities paid after date of death, mortgage balance on date of death.

DECEDENT'S FULL NAME: _____

ADDRESS AT DEATH: _____

DATE OF DEATH: _____ SSN _____ - _____ - _____ PARISH _____

DID DECEDENT HAVE A WILL? YES _____ NO _____

IF YES, WHO WAS THE NOTARY? _____

SAFE DEPOSIT BOX: YES _____ NO _____ BANK/BRANCH _____

SPOUSE 1: _____ MARRIAGE ENDED IN DEATH/DIVORCE? _____

SPOUSE 2: _____ MARRIAGE ENDED IN DEATH/DIVORCE? _____

SPOUSE 3: _____ MARRIAGE ENDED IN DEATH/DIVORCE? _____

SURVIVING SPOUSE:

NAME: _____ AGE AT DECEDENT'S DEATH: _____

ADDRESS: _____ **PARISH/CO.** _____

SSN: _____ - _____ - _____ **email** _____ **CELL** _____ **HO/WK** _____

DOB _____ **IS THERE A PRE-NUP? YES/NO** _____ **RECORDED WHERE?** _____

CHILDREN: ANY DECEASED? Y/N **IF YES, INCLUDE IN LIST** **MINORS?** Y/N

**IF CHILDREN DIED LEAVING CHILDREN, PLEASE INCLUDE IN LIST

NAME: _____ **SPOUSE:** _____

ADDRESS: _____ **PARISH/CO.** _____

SSN: _____ - _____ - _____ **email** _____ **CELL** _____ **HO/WK** _____

NAME: _____ **SPOUSE:** _____

ADDRESS: _____ **PARISH/CO.** _____

SSN: _____ - _____ - _____ **email** _____ **CELL** _____ **HO/WK** _____

NAME: _____ **SPOUSE:** _____

ADDRESS: _____ **PARISH/CO.** _____

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SSN: _____ - _____ - _____ **email** _____ **CELL** _____ **HO/WK** _____