Probate Checklist: What to Gather

Circle of Life Legal Services

Gather what you can from this list before our first call. You don't need everything to get started, so check off what you have and send it over. Anything you can't find, we'll help you track down. What you do find, please email a scanned copy (or photo) to **Marty@CircleOfLifeLegal.com** or fax to **855-810-8239**.

About the person who passed

- ☐ Certified death certificate (order 3 to 5 copies from the funeral home)
- ☐ Original will and any amendments (the original, not a copy, since Florida law requires it be filed with the court)
- ☐ Any trust documents
- ☐ Full legal name, date of birth, date of death, and last home address
- ☐ Marital status at death (married, divorced, widowed, never married)

Family and beneficiaries

For each person below: full name, relationship, address, phone, email, and date of birth.

- ☐ Surviving spouse
- ☐ All children, including any who have passed away (and their children)
- ☐ Everyone named in the will
- ☐ Note anyone who is under 18 or unable to manage their own affairs
- ☐ Who wants to serve as personal representative (if they live outside Florida, tell us, since Florida limits who can serve)

Assets

List what you know. Approximate values are fine.

- ☐ Real estate: address and whose name is on it
- ☐ Bank accounts: bank name, last statement, and whether anyone else is on the account or named as beneficiary
- ☐ Investment and brokerage accounts: most recent statements
- ☐ Retirement accounts and life insurance: company name and who is listed as beneficiary
- ☐ Vehicles: titles
- ☐ Business interests
- ☐ Valuables: jewelry, collections, art

Bills and debts

- ☐ Mortgage statements
- ☐ Credit card statements
- ☐ Medical bills
- ☐ Funeral bill
- ☐ Property tax bills
- ☐ Any lawsuits, judgments, or money owed to the person who passed

Before we speak

- **Don't** pay the estate's debts out of your own pocket
- **Don't** sell, give away, or divide any property
- **Don't** close accounts or move money
- **Don't** throw away mail. It often shows accounts and bills we need to know about

Questions? Contact us

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We handle probate throughout Florida, mostly by phone and video, so you don't need to come to our office.