

**CHECKLIST OF ITEMS TO BRING TO INITIAL PROBATE APPOINTMENT
WITH ATTORNEY PAUL MILLER**

- **Original** Last Will and Testament and Original Trust document if decedent had a Trust.
- Death Certificate, if available
- A sheet with full legal Names and Addresses of all parties named in the Will; and all parties that were the lineal descendent(s) of the decedent. For parties named in the Will we will need their Social Security Numbers for tax filings.
- Original deed(s) to any real estate owned by the decedent
- Funeral contract or 'paid' funeral receipt, if available
- Bank statement(s) and brokerage statements – most recent
- All original stock certificates owned by the decedent
- IRA statements or annuity contracts owned by decedent
- Copy of any military discharge papers of the decedent
- List of any assets owned outside of the State of Ohio
- Copies of the decedent's personal income tax returns for the last 2 years, both state & federal and city, if applicable
- Corporate records for any closely-held company owned by the decedent, including Buy-Sell Agreements
- Any accounts in the name of the decedent that were held jointly with other parties
- A copy of any notes receivable owned by the decedent
- A list of liabilities owed by the decedent to third parties, as applicable supply supporting detail statements or notes and mortgages.
- Copies of all life insurance policies and annuity contracts.
- Car title(s)
- Boat title(s) and RV title(s)
- Any Lease Agreements
- If decedent had a spouse that passed away prior to them, please bring any probate papers or files relative to the predeceased spouse's estate if applicable, including any estate tax returns as filed
- Savings bonds

Note: All items noted above may not be available for the initial meeting with me, bring what is available. My office will make copies of all items as necessary.