NAELA
National Academy of Elder Law Attorneys

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Estate Administration Checklist

- [ ] Original will
- [ ] Two original death certificates
- [ ] Copy of deed, property tax statement
- [ ] A copy of the last year tax return you filed
- [ ] Copy of all investment accounts, such as IRA's, 401 (k) plans, mutual funds, pensions, etc. (if applicable)
- [ ] A copy of stocks, bonds, annuities (if applicable)
- [ ] A copy of all bank statements for the month of death
- [ ] A copy of life insurance policies (if applicable)
- [ ] A list of items located in the safety deposit box (if applicable)
- [ ] A copy of the last credit card statements (if applicable)
- [ ] A copy of the last mortgage statement (if applicable)
- [ ] A list of beneficiaries, including names, addresses, social security numbers, and date of birth

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- [ ] A list of beneficiaries, including names, addresses, social security numbers, and date of birth
- [ ] Copies of Living Trusts
- [ ] Retirement and Pension Plan Documents
- [ ] Debt-Related Documents
- [ ] Documents of Receivables (Debts owed to the decedent)
- [ ] Federal Gift Tax Returns and Gift-Related Documents
- [ ] Partnership or Buy-Sell Agreements
- [ ] Contact Information of Related Parties

Be aware that additional information may be requested at the time of the application. Please mail all information to the Union office, located at 1767 Morris Ave., Union, NJ 07083.

I you have an questions, please call us at **(908) 206-1000**, or you can always email us at **beneckman.elderlaw@gmail.com**