

ESTATE ADMINISTRATION CHECKLISTS

Documents to gather

- Death certificate
- Will, and any codicils (unless already at Probate Court)
- Decedent's social security card
- Medicaid records
- Last Vermont and federal income tax returns
- Any prior gift tax returns
- Prenuptial, marital agreements
- Social security and VA benefit information
- Life insurance policies/statements
- Bank statements, brokerage account statements
- Stock, bond, savings bond certificates
- Safe deposit box keys, rental statements
- Title certificates for vehicles and other personal property
- Deeds, mortgages

Information to gather (name, address, telephone)

- All next of kin (spouse, children, parents, siblings, cousins, etc.)
- All other will beneficiaries
- Date of birth of everyone under 18 years of age
- Social security numbers for all beneficiaries

Resources (name, address, telephone)

- Decedent's tax preparer
- Decedent's employer
- Labor union to which decedent belonged