ROBINSON & WILSON

A LAW CORPORATION
Street: 11665 Avena Pl #108, San Diego, CA 92128
Mail: P.O. Box 270099 San Diego, CA 92198

Roberta J. Robinson
RobertaRobinson@TrustLaw.us

State Bar of California Legal
Specialist Estate Planning,
Trust & Probate Law

Tel: 858.485-1990
Fax: 858.487-8240
www.TrustLaw.us

Daniel J. Wilson
DanielWilson@TrustLaw.us

Master of Laws in Taxation
State Bar of California Legal
Specialist Estate Planning,
Trust & Probate Law

Estate Administration
Preparation for the First Meeting

Worksheets

In preparation for your first meeting, please work on completing the attached worksheets. Do not feel overwhelmed, since you have many months to gather all this information.

Immediate Action

These are the steps which need your immediate attention.

_______	Death Certificates:	Order several certified death certificates. Information which may be required: Decedent's mother's maiden name and where born; father's name.
_______	Original Will and Codicils:	Locate originals and provide to attorney. Make a copy for your records.
_______	Original Trust and Amendments:	Locate originals and provide to attorney. Retain possession of Trust and all amendments.
_______	Social Security/Pensions:	Notify of death. 800-772-1213 https://www.ssa.gov/survivors/ Request any death benefits.
_______	Social Security Online answers to Questions: https://www.ssa.gov/planners/survivors/howtoapply.html	

________	Credit Cards:	Notify company of death and Destroy cards in decedent's name.
________	Health Insurance	Notify insurer of the death.
________	Automatic Payments:	Review and terminate if necessary, e.g., decedent's health insurance.
________	Automatic Distributions:	Review and terminate if necessary, e.g., brokerage account monthly payments
________	Change of Address:	Complete form with post office or online.
________	Liability Insurance:	Review policies and payment due dates.
________	Addresses of heirs:	Provide attorney with names, mailing addresses, email addresses, and telephone numbers of heirs and beneficiaries.
________	Make an Appointment with the Estate Planning attorney	

ROBINSON & WILSON

A LAW CORPORATION
Street: 11665 Avena Pl #108, San Diego, CA 92128
Mail: P.O. Box 270099 San Diego, CA 92198

Roberta J. Robinson
RobertaRobinson@TrustLaw.us

State Bar of California Legal
Specialist Estate Planning,
Trust & Probate Law

Tel: 858.485-1990
Fax: 858.487-8240
www.TrustLaw.us

Daniel J. Wilson
DanielWilson@TrustLaw.us

Master of Laws in Taxation
State Bar of California Legal
Specialist Estate Planning,
Trust & Probate Law

Estate Administration Worksheet

GENERAL INFORMATION	
Decedent's Name:	Date of Death:
Did decedent receive Medi-Cal during lifetime?	Yes ☐ No ☐

ASSETS
Check Title To The Assets - Joint Tenancy, Community Property, Separate Property

Personal Effects: Cars, Collectibles, Art, Jewelry 3,000+, Miscellaneous		
Asset	Owner	Value

Real Estate: (Please bring copies of Deeds, Written Valuations, Mortgage Statement)			
Address	Ownership/Title	Debt	Market Value

ASSETS
<u>Check Title To The Assets</u> - (Found on Account Statements)

Cash Accounts: (Bring recent statement)		
Institution	Title/Ownership	Current Balance

Securities: Includes Stocks, Bonds, Brokerage Accounts (Bring Recent Statements)		
Institution	Title/Ownership	Current Balance

Retirement/Pension Plans (Include Ira's, 401k's, Corporate Plans)		
Institution	Beneficiary(ies)	Market Value

ASSETS
<u>Check Title To The Assets</u> - (Found on Account Statements)

Life Insurance And Annuities: (Please bring policy or beneficiary designation form)		
Company	Beneficiary(ies)	Death Benefit

Promissory Notes, Trust Deeds, Mortgages: (Monies owed to Trust/Estate)			
Debtor	Payee (Decedent or Trust)	Amount Owed	Secured?

Partnership Agreements		
Partnership Name	Title/Ownership	Market Value

OTHER ASSETS		
Any other Asset	Title/Ownership	Value

LIABILITIES

Funeral and Estate Administration Expenses		
Description	To Whom Paid	Amount

Mortgages, Liens, Property Taxes		
Description	To Whom Owed	Amount

Loans (automobile, personal, insurance, credit cards, etc.)		
Description	To Whom Owed	Amount