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Document Checklist

As the assigned Personal Representative, you will be required to obtain the following documents. This is a short list of initial documents usually needed for a Florida probate or trust administration. After your initial consultation with a probate or trust attorney, you will likely be requested to secure other documents. This checklist is designed as a resource for you to get started. Please always consult your attorney for any additional documentation that is required.

____ 1. Minimum of 10 Death Certificates (these can usually be obtained through the funeral home)

____ 2. Original Will and all codicils if applicable

____ 3. Originals of all trusts and any amendments or restatements

____ 4. Copy of paid funeral bill

____ 5. Copies of all deeds for real property owned by decedent

____ 6. Tangible Personal Property Memorandum or writing indicating instructions for distribution of tangible personal property (such as jewelry, furniture, cars)

____ 7. Income tax returns for last 3 years

____ 8. Copies of all bank statements, brokerage account statements, or reports from investment advisors

____ 9. Copies of all life insurance policies

____ 10. All corporate records if decedent owned any corporations, limited liability companies, partnerships or other entities.

Please Note: This list is provided to you as resource for your position as Personal Representative. I am not an attorney and am not offering legal advice. If you don't have a Probate Attorney I would be happy to refer you to one that can assist you.