

# **WARD & MURPHY**

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## **DOCUMENTS WE NEED TO HELP YOU DISTRIBUTE ASSETS OWNED BY A PERSON WHO IS NOW DEAD - OR "PROBATE"**

- 1) the ORIGINAL will (if one exists - do not worry if you cannot find one - just tell us and we'll work through that issue with you)
- 2) at least 2 copies of ORIGINAL SEALED death certificates
- 3) copies of all deeds to real property
- 4) copies of all title to motor vehicles
- 5) appraisals of any personal property
- 6) bank and brokerage account statements
- 7) letters or statements from any entity seeking the payment of monies by the deceased or the deceased's estate
- 8) all life insurance records
- 9) all medical insurance records
- 10) any Medicaid or Medicare statements
- 11) the last three years' of the deceased person's income tax returns