

TERRY R. LEACH*
TENA G. FOX*

LEACH & FOX
ATTORNEYS AT LAW, P.C.
460 W. HARWOOD ROAD
HURST, TEXAS 76054-2939
WWW.LEACHLAW.COM

(817) 280-0811
(800) 949-1777
FAX: (817) 282-4127

* BOARD CERTIFIED
ESTATE PLANNING & PROBATE LAW
TEXAS BOARD OF LEGAL SPECIALIZATION

GATHERING INFORMATION FOR THE ESTATE

Decedent's Personal Assets

1. **Decedent's Personal Belongings** - locate and secure:
 - Wallet, purse, briefcase - check for cash, debit/charge cards, checkbook and Social Security card
 - Cell phone
 - Computer
 - Digital device(s)
 - Calendar, agenda, etc.
 - Jewelry
 - Collectibles (e.g., art, coins, guns, etc.)

2. **Decedent's Records and Papers**
 - A. Locations to search:
 - House _____
 - Desk _____
 - File Cabinet _____
 - Closet _____
 - Garage _____
 - Other _____

 - Office _____

 - Storage Unit _____

 - Safe Deposit Box _____

- B. Items to locate:
 - Income tax returns _____
 - Real property deeds, purchase documents and tax statements _____
 - Account agreements and statements _____
 - Loan documents _____
 - Titles and purchase records for vehicles boats trailers mobile home motorcycle
 - Lease agreements _____

Insurance records - life health property automobile
Stock certificates _____
Bonds _____
Annuity contracts _____
Governmental benefits statements (Social Security, Medicaid, etc.) _____
Pension records _____
Military records _____
Legal records _____
Employment records _____
Other _____

3. **Decedent's Data Storage** - search these to locate and identify Decedent's assets and obligations:

Files/papers _____
Computer _____
Digital device _____
Calendar/agenda _____
Account records _____
Voice mail _____
Safe/deposit box _____