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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 _____