

EVANS & ASSOCIATES

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INITIAL PROBATE MEETING CHECKLIST

To properly prepare a probate strategy, you will need the following items.

1. Original Will
2. Death Certificates
3. Name, birthday, and social security number of deceased person.
4. Date and cause of death.
5. Name, address and phone numbers of beneficiaries.
6. Name, address and phone numbers of executor(s).
7. Family Information
 - Parents
 - Children
 - Brothers/sisters
 - Aunts/uncles
 - other
8. Name and address of known creditors (as you obtain bills, you can forward copies to our office)

Please also prepare a list of assets:

1. Real Estate:
 - Home
 - Other real estate
 - Copy of Mortgage Statement
2. Stocks & Bonds:
 - Brokerage accounts
 - Individually held stock certificates

Bonds

3. Money Market Accounts
4. Bank Accounts
5. Trust deeds, first mortgages (we are referring to investments in first mortgages, not your home mortgage)
6. Cars - make, model, and VIN is needed
7. Stock options
8. Business entities (Corps, LLCs, partnerships, sole proprietorships)

If you would like more information about setting up a Nevada Probate, feel free to call our office for a complimentary consultation at 702-699-7333.