



# TULLY LAW GROUP

ELDER CARE AND ESTATE PLANNING

HONOR & PROTECT

## **Documents Requested for Probate/Estate/Trust Administration Consultation**

**Please bring copies of the following important items to the initial  
consultation:**

- \_\_\_\_\_ **Wills (original if possible – do NOT unstaple)**
- \_\_\_\_\_ **Trusts (original if possible)**
- \_\_\_\_\_ **Family Tree (Name, Addresses, Deceased or Disabled)**
- \_\_\_\_\_ **Names & Address of any Non-family Beneficiaries**
- \_\_\_\_\_ **Copies of all Financial and Insurance statements**
- \_\_\_\_\_ **Death Certificate (3 originals)**
- \_\_\_\_\_ **Deceased Spouse's Death Certificate (if applicable)**
- \_\_\_\_\_ **Deceased Child's Death Certificate (if applicable)**
- \_\_\_\_\_ **Creditor and/or Debt Information**
- \_\_\_\_\_ **Marital Agreements (Pre-Nuptial or Post-Nuptial)**
- \_\_\_\_\_ **Copies of Recorded Deed(s) to all Real Property  
regardless of location**
- \_\_\_\_\_ **Business Agreements (Buy/Sell or Shareholder, etc.)**
- \_\_\_\_\_ **Paid Funeral Bill**