

## Informational Checklist for: Probate Administration

1. Name of decedent:  
Last address:  
Social Security Number:
2. Name of decedent's spouse, if any:  
Address:  
Social Security Number:
3. Decedent's date of death:
4. Decedent's date of birth:
5. Place of death:
6. Domicile (residence) at time of death:
7. Date (approximate) when decedent moved to Arizona:
8. Date of Will, if any:
9. Date of Codicil(s) if any:
10. Personal Representative's information:
  - a. Name:
  - b. Address:
  - c. Phone number:
  - d. Relationship to decedent:
  - e. Priority for appointment:
  - f. Date of Birth:
  - g. Social Security Number:

## Informational Checklist for: Probate Administration

- h. Sex:
- i. Race:
- j. Height:
- k. Weight:
- l. Hair Color:
- m. Eye Color:
- n. Employer:
- o. Employer address:

11. Is the bond waived in the Will:

Interested parties can waive the bond, if there is no Will.

If bond is required, estimate value of estate:

Personal Estate:

Real Estate:

Expected Annual Income:

12. Any restrictions upon the personal representative?

If yes, list them:

13. Names, addresses, dates of birth (for any minors) and social security numbers for all beneficiaries named in the Will or the heirs, if no Will:

## Informational Checklist for: Probate Administration

14. Names, addresses, dates of birth (for any minors) of all heirs not named in the Will:

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15. You will also need:

- a. Original Will, if there is one.
- b. List of assets and/or documentation showing titles (i.e., copies of deeds to real property, bank statements, brokerage statements, stock certificates, insurance policies, automobile/mobilehome titles).
- c. Death certificates.
- d. List of all debts/creditors, mortgages, liens, account numbers, etc. or copies of bills/statements.
- e. Copy of last tax return; name of accountant.