VIRGINIA ESTATE
& TRUST LAW

Estate Settlement Pre-Meeting Document Checklist

Our initial meeting will be more productive if you are able to provide as many of the documents listed below as possible. Please do not be concerned, however, if you cannot provide everything for the first meeting.

- ☐ Several original death certificates (if available)
- ☐ The decedent's original will, codicils, trust agreements, trust amendments and powers of attorney
- ☐ Contact information for all beneficiaries of will and trusts
- ☐ Information regarding the decedent's employment benefits, including retirement plans and group life insurance policies
- ☐ Deeds to real estate owned individually or jointly by the decedent
- ☐ Title to vehicles owned individually or jointly by the decedent
- ☐ Recent statements for all bank and brokerage accounts owned individually or jointly by the decedent or titled in a trust
- ☐ Life insurance policy binders
- ☐ Trust agreements naming the decedent as a current beneficiary
- ☐ Previously filed gift tax returns
- ☐ Personal income tax returns for the previous three years
- ☐ Financial statements and income tax returns for the last three years for each business, farm, partnership LLC, etc. in which the decedent owned an interest, as well as all partnership and operating agreements, buy-sell agreements, and other relevant documents
- ☐ Premarital and post-marital agreements

Questions? Please contact your attorney directly.

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