LAW OFFICES OF MILLER & MILLER, P.C.
ATTORNEYS AND COUNSELORS AT LAW

GORDON A. MILLER
Attorney at Law
office: 313.386.1400
fax: 313.386.3845
email: gordon@miller-law.net

PROBATE CHECKLIST

Checklist of Items to Be Brought by Client to Initial Appointment

- Three certified copies of the death certificate or as many as necessary for transferring assets.

- Legal documents: copy of the decedent's birth certificate, last will, codicils, trust(s), handwritten/typed lists of personal property, prenuptial/marital agreements, child support orders, life insurance policies, beneficiary designations, buy/sell agreements, operating agreements, contracts/notes, deeds, land contracts, loan agreements, title to automobile, boats, etc.

- Financial documents: any information available describing the decedent's assets and liabilities, such as bills, bank statements, investment reports, copies of bonds, stocks, mortgages, corporate financials, income tax returns, business records, real estate documents, the decedent's check register, and the like.

- Names and addresses of the following: (1) decedent's spouse, if any, and surviving children and issue of deceased children, if any; (2) if no surviving spouse, children, grandchildren, then to decedent's surviving parents; (3) if no surviving parents, then to brothers and sisters of decedent and the children of deceased brothers and sisters.

- Names and addresses for all heirs listed in the decedent's last will and/or trust(s)

- If there are none of the above, question the client and family, if any, very carefully to determine who the heirs are under *MCL 700.2103(d)*.

- Social Security numbers of all who will receive property from the estate (if estate tax returns are required).