

Please provide any asset and/or claim information of which you are aware that is owned by the Decedent, to the best of your knowledge, and bring any related asset documentation with you to your consultation.

Cash: List the following for each account owned by Decedent:

- Name of Bank
- Type of account (checking, savings, money market, etc.)
- Account Number; and
- Amount in the account as of date of death.
- Also list the style of the account (Ex: Individual, Joint Tenant, Joint Tenant Right of Survivorship, Pay-on-Death, etc.)

Real Property: List the following for all properties in which Decedent had an interest in at date of death:

- Physical address of property (including county);
- Legal description of property (lot, block, section, etc.), and
- Value of property as of date of death (according to appraisal district).

Stock and Bonds: List the following for all stocks and/or bonds owned by Decedent at date of death;

- Name of Company stock in owned in;
- Number of shares or amount of bonds;
- Value of each stock/bond as of date of death;
- If bonds, need bond number, and
- If stock, need the par value per share as of date of death.

Vehicles: List all vehicles owned as of date of death;

- Year, make and model of vehicle;
- Vehicle identification number; and
- Value of vehicle as of date of death.

Miscellaneous Items: List the value of the furniture, fixtures, clothing and jewelry.

Oil, Gas, Mineral Interests: List all interests, if any, in which Decedent owned at time of death:

- Legal Description of property;
- Name and address of lessee, if any; and
- Value of such interest.

List of Claims: List the following for any claims/debts owed to the decedent at the date of death:

(Not claims owed by the decedent)

- Name of creditor;
- Amount of claim; and
- General nature of claim.