

## **ITEMS NEEDED FOR ESTATE RETURNS**

1. Executor/s: Name, address, Social Security number, phone number
2. Beneficiaries: Name, address, relationship to decedent, age, Social Security number
3. Attorney: Name, address, Social Security number, phone number
4. Certified copy of Will and any Codicils
5. Copies of all trust agreements where the decedent was a grantor, trustee or beneficiary
6. Letter of Testamentary
7. Certified copy of death certificate
8. Last three tax returns filed for decedent
9. Gift tax returns (if filed)
10. Real Estate: Property tax statements for year of death; copy of deeds
11. Stock and Bonds: Statements for month of death
12. CD, Notes and Cash: Need checkbooks and Statement for Checking Accounts; need instrument for notes and need certificates for CDs.
13. Insurance: Copy of Form 712 (Life Insurance Statement) for each policy on decedent's life
14. Value of furnishings and fixtures; value of personal effects; make, model and mileage of car
15. Expenses: Funeral expenses and administrative expenses (All disbursements since date of death)
16. Details of any assets that were sold since date of death.