



WHAT I SHOULD BRING TO MY INITIAL PROBATE CONFERENCE

- Original Will, if in your possession, and any Trust documents or Marital Property Agreements.
- Name, address, and social security number of the decedent, names and addresses of nearest relatives and, if there is a Will, of the nominated personal representative and all beneficiaries under the will. If any beneficiaries are minors, include their date of birth. If the decedent was ever married, name of spouse (including former), and whether living or deceased.
- If the decedent received Medical Assistance (Medicaid), or benefits from the Community Options Program (COP), Wisconsin Chronic Disease Program, or had a spouse who ever received such benefits, the recipient's name, social security number, and when the recipient received the benefits.
- Any recent statements for all financial and bank accounts (checking, savings, certificates of deposit, brokerage accounts, mutual funds, annuities, pensions, etc.) that the decedent owned, including the institution name, account numbers, how titled and any beneficiary or payable on death designation, if known.

We will also need the following information early in the probate process:

- Certified copies of death certificates, if you have received them.
- Title to all vehicles in the decedent's name (whether held individually or jointly).
- Original or copy of deeds or other documents showing the legal description of any real estate in which the decedent had an interest.
- List of all life insurance policies, including policy number, death benefit, face amount and beneficiary information, if known. If possible, bring in the policies.
- Original or copy of any stock certificates or bonds, including US Savings Bonds.
- If the decedent was a member of any partnership or had any rights under an existing contract, a copy of such partnership agreement or contract.
- A list of outstanding debts of which you are aware: credit cards, charge accounts or loans.
- Copy of decedent's most recent tax returns.

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