

Documents and Information to bring in:

- Original Will and Codicil, if any
- Three (3) certified copies of death certificate
- Bank statements and checkbook register since beginning of the year
- Investment statements since beginning of the year
- Social Security benefits statement for the current year
- Vehicle titles
- Savings bonds, stock certificates and other securities
- Life insurance policies and latest annual statement
- IRA, pension plan and other retirement account statements
- Deeds and most recent property tax bill for real estate
- Health insurance policy information and ID cards
- Creditors billing statements – credit cards, loans, utilities, medical
- Funeral bill and statements for any other related expenses
- Copies of last 3 years of tax returns
- Full names and addresses for children of Homer
