

# Probate Document Checklist

- Certified death certificate
- Last will and testament (if applicable)
- List of heirs and beneficiaries with contact information
- Funeral bills/receipts
- Real estate deeds
- Bank account statements
- Investment and retirement account statements
- Life insurance policies
- Vehicle titles
- Business ownership documents
- Outstanding bills or debts
- Tax returns (most recent 2–3 years)
- Safe deposit box inventory
- Any court correspondence or prior probate filings