

REQUIRED INFORMATION

First Name		Middle Name		Last Name	
Maiden Name		Father Name		Mother Maiden Name	
Marital Status	Spouse (Maiden) Name		Gender	Social Security #	
Birth Date	Birth Place		Race	Military Branch / Discharge	
Occupation		Industry		Education	
Home Address			City	State	Zip

DOCUMENTS NEEDED FOR ESTATE SETTLEMENT

Government

- Birth Certificate
- Passport
- Social Security
- Medicare
- Driver's License
- Immigration documents
- Gun Permit

Legal

- Will
- Directives
- Power of Attorney
- Marriage papers
- Divorce papers

Assets

- Real Estate titles and deeds
- Real Estate lease agreements
- Car titles and registration
- Car Leases

Business

- Business agreements
- Tax returns

Employment

- Employment contracts
- Benefits statements
- Pension statements

Financial

- Bank statements
- Brokerage statements
- Credit card Statements
- Mortgage statements
- Loan agreements
- Stock & bond certificates
- Safe deposit box keys (home)
- Safe deposit box keys (bank)

Insurance

- Home policy
- Car policy
- Life policy

Funeral

- Arrangement contract
- Cemetery plot title
- Insurance policy