

Family and Individual Trust Estate Checklist

1. Copy of Driver's License or Passport
2. Copy of Primary Home and All Real Estate Properties Deeds
3. Copy of Tax Bill for All properties
4. Copy of All Annuities, 401K, and All Personal Retirements Statements
5. Copy of Names of All Children Names, Date of Birth, and Social Security Number
6. Copy of Asset Equity Net Worth Worksheet
7. Copy of Divorce Decree, (If Applicable)
8. Copy of Property Closing Statements, (If Applicable)
9. Copy of letter of Instructions for Will