An Estate Check List

___ Market value of the client’s home(s) and other real property

___ Real estate-related debt, such as mortgages and home equity loans.

___ Client’s most recent tax return.

___ Life insurance information.

___ Long-term care and/or disability insurance information

___ Will.

___ Living trust.

___ Business retirement plan information with statements of value.

___ Individual Retirement Account (IRA) statements

___ All other investments

___ Employer’s retirement and deferred compensation information, such as a 401(k), 403(b) and pension statements.

___ Businesses investments or ownership.

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