

LAW OFFICES OF MARIALTA Z. SPARAGNA, LLC

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Decedents Long Form Worksheet

Decedent _____

Date of Death _____

Please provide the following information and /or documentation. Some information may not be readily available and will have to be provided at a later time. Answer questions directly on this form and return it to our office to begin the probate process. Please do not answer questions on a separate sheet of paper.

1. Name of Executor/Executrix, mailing address, phone number, social security number and email address.

2. Original Will if applicable and Codicils, if any, Trust Agreement, if any.

3. One Certified copy of the Death Certificate.

4. A copy of the receipted funeral bill and any additional funeral expenses not included in the funeral bill or prepaid funeral contract
 - a. Flowers:
 - b. Clergy:
 - c. Music:
 - d. Obituary Notice:
 - e. Headstone lettering:
 - f. Funeral bill:
 - g. Grave opening:

5. Names and current addresses of any beneficiaries named in the will or next of kin (heirs at law) who might not be named in the will. If any beneficiaries are minors, please list date of birth and name of legal guardian or parent.

6. Names and dates of death of any deceased person named in the will, or, if there is not a will, names and dates of death of any spouse or siblings. If spouse is deceased, give date of death. If divorced, provide divorce decree.
7. Was the decedent or his/her spouse or children recipients of State assistance?
Decedent:
Children:
Spouse:
8. Did the decedent rent a Safe Deposit Box? Joint or sole? Please provide the name and address of the bank and the box number.
9. List any solely owned bank accounts held by the decedent. Give name of financial institution, type of account (checking, savings, CS, etc), account number and exact balance on the date of death.
10. List any jointly held bank accounts held by decedent. Give name of the joint owner, name of financial institution, type of account, account number and exact balance on the date of death. This would include 'trustee' and 'payable on death' accounts.
11. List any solely held stocks, corporate bonds, treasury notes, and US Savings bonds, giving number of shares held or denomination of bonds and the name of the company or corporation, etc. issuing the certificates. Provide a copy of each security of savings bond.
12. List any jointly held stocks, corporate bonds, treasury notes, and US Savings bonds. Giving number of shares held or denomination of bonds and the name of the company or corporation, etc. issuing the certificates. Provide a copy of each security of savings bond.

13. If securities are held in a brokerage account, provide the name of the firm, the account number, the names in which the brokerage account is held. Provide the date of death value of the securities and any cash accounts held by the brokerage firm as of the date of death. The brokerage firm should give you a list in writing unless the date of death was the exact date of the end of the statement period.
14. List any jointly held real estate (improved or unimproved) in Connecticut and any other state, in which the decedents owned any interest in at the date of his/her death (life use is an interest). Provide copies of all deeds. You will need to obtain date of death values for the fair market value each property from a realtor or appraiser. The assessment value from the town tax rolls is not acceptable. A full appraisal may be needed if the real estate is values at \$500,000.00 or more.
15. List name of the financial institution/individual, account number, balance due for any mortgage or home line of credit for any of the above-referenced real estate. This information should be obtained in writing from the mortgage holder if possible.
16. List any motor vehicles owned, as well as motorcycles, boats, house trailers or boat trailer. Provide copies of all titles to all vehicles.
17. List all IRA's pensions and annuities. Give account numbers, group numbers, and names of beneficiaries. Determine whether there will be a lump sum payment of any of the above or a payment over a period of time. Provide how much was contributed to the IRA, pension or annuities by the decedent. You should obtain a letter from the company holding the pension or annuity giving this information.

18. List any other assets such as valuable jewelry, antiques, coins, boats, stamp collections, paintings, antique cars, etc. that might have a value of \$1000.00 or more. If any such asset is mentioned in the will you may need to obtain an appraisal.
19. Provide information regarding any life insurance policies owned by the decedent, not only on his/her own life but on the life of another. Include the name of the beneficiary (if any). If no beneficiary is named, the proceeds of the policy will go into the estate. If this is the case, we will need to know what the proceeds will be. An estate may have to be opened in order to collect the insurance. Please provide a copy of any proceeds checks and the letters that come with the checks (also called Explanation of Benefits).
20. List any un-deposited or uncashed checks in the decedents' name at the date of death, such as Social, security, pension or medical reimbursement checks. Make copies of all checks before depositing them. As other checks come in during the estate settlement process, be sure to copy them and notify the office.
21. Was the decedent the owner of a business or partnership? If so, provide a copy of the articles of incorporation or the partnership agreement. Please also provide a copy of the most recent business income tax filing.
22. Did the decedent create and fund any trusts during his/her lifetime? If so, provide a copy of the trust instrument and information regarding the assets held in the trust.
23. Did the decedent give away any assets or make gifts of assets, including real estate, cash, bank accounts, securities, savings bonds or automobiles, since

January 1, 2005? If so, please list the gifts, the name of the recipient and the date of the gift.

24. Did the decedent own any mortgages or notes (mortgages of someone else's property or a loan made to someone else)? If so, give the name of the person to whom the loan was made, the date, and the unpaid balance at the time of death.

25. Are there any outstanding medical bills (after insurance payments) for services provided prior to death? If so, list below. If you know there are bills but do not yet know the amount, list the name of the provider of the services, what the services were, and verify the amount of the bills as soon as you have the information.

26. List any outstanding bills for credit cards, mechanics liens, or utilities.

27. List any outstanding mortgages, personal loans collateral loans, rental amount, real estate taxes, personal property taxes, income taxes, or any other debt incurred before death but paid or to be paid after death.

NOTES: Give details of any information not requested above that might be necessary in order to properly settle this estate but did not have enough room for.