Eden Rubenstein Toner
Attorney and Counselor at Law

ESTATE SETTLEMENT
CASE INFORMATION

Decedent's Name:
Date of Death:

Documents Needed:

Original Will or Revocable Living Trust
Original Community Property Agreement
Death Certificate
3 years Income Tax returns, check registers (for identifying potential creditors)
Bank and brokerage statements with balances as of date of death
Securities certificates, US Savings Bonds
Real estate deeds
Life insurance policies and claim forms
Social Security card
Veterans information—discharge papers
Insurance policies on real estate, personal property
Safe deposit box inventory

Other information to review at initial meeting:

Estate checking account
Family allowance
Real estate caretaker, security, utilities
Pet care

Qualification of Personal Representative (RCW 11.35.010)

Over age 18
Of sound mind
No conviction of felony or crime of moral turpitude
Washington resident or written designation of in-state agent

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Client information:	**Decedent information:**
Name:	Name:
Address:	Other names used:
	Residency at death (county, state):
Home phone:	Date of death:
Cell phone:	Place of death:
e-mail:	Place of birth:
Date of birth:	Date of birth:
Social Security No:	US citizen?
Relationship to decedent:	Social Security No:
Appointed in Will or Trust?	
Beneficiary information:	***(Complete for each beneficiary—add sheets as necessary)***
1. Name:	2. Name:
Address:	Address:
Home phone:	Home phone:
Cell phone:	Cell phone:
e-mail:	e-mail:
Date of birth:	Date of birth:
Social Security No:	Social Security No:
Relationship to decedent:	Relationship to decedent:
3. Name:	4. Name:
Address:	Address:
Home phone:	Home phone:
Cell phone:	Cell phone:
e-mail:	e-mail:
Date of birth:	Date of birth:
Social Security No:	Social Security No:
Relationship to decedent:	Relationship to decedent:

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ASSET DATA

(Use additional sheets as necessary)

1. Bank Accounts

Name of Institution; Type of Account; Name(s) on account*; Balance on date of death

*(Attorney use) *If JTWROS, does Will override joint tenancy?*

2. Brokerage Accounts

3. Real Estate

Type of Property and Location; Name(s) on title; Fair Market Value; Mortgage balance

4. Retirement Accounts

Participant Name; Beneficiary Name; Financial Institution or Custodian; Approx. value

5. Pension Plans

Participant Name; Beneficiary Name; Beneficiary after death; Company; Approx. value

6. Partnership or Business Interests

Name of Entity; Type of Entity; Percent of Interest; Approx. Value; Name(s) on title

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7. Promissory Notes or Sales Contracts owed to Decedent
Payor; Date of instrument; Collateral, if any; Current balance

8. Tangible Personal Property
Location; Name(s) on title, if any; Intended beneficiary, if any; Value

Furniture

Automobile(s)

Boat

Art/Collectibles

Other

9. Life Insurance
Name of Insured; Beneficiary; Insurance Company; Face value/Cash value

10. Annuities
Annuitant Name; Beneficiary after Annuitant's death; Issuing Company; Present Value

(Attorney use) Net Estate for Tax Purposes

Other Insurance Company Insured Policy Number
Health
Long Term Care
Disability
Other