LAW OFFICE OF
GERALD F. CHEFALO
ATTORNEYS AND COUNSELORS

CHECKLIST: ITEMS TO BRING TO INITIAL ATTORNEY MEETING

1. Copy of decedent’s last will (if you do not have one).

2. As much information as is available describing decedent’s assets and liabilities, such as bills, bank statements, investment reports, income tax returns, business records, real estate documents, the decedent’s check register, and the like.

3. Names and addresses of the following:

a. decedent’s spouse, if any, and surviving children and issue of deceased children, if any

b. if no surviving spouse, children, or grandchildren, decedent’s surviving parents

c. if no surviving parents, the brothers and sisters of decedent and the children of deceased brothers and sisters.

If none of the above, question the family, if any, and the client very carefully to determine who the heirs are under MCL 700.2103(d).

4. Decedent’s vital documents (e.g., birth certificate, death certificate, deeds, insurance policies, divorce judgments) if available.

5. Social Security numbers of all who will receive property from the estate (if estate tax returns are required).

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