TEECE HODGSON & WARD | SOLICITORS

ESTATE CHECKLIST

To assist us in obtaining the information necessary to proceed with the Estate's application for Probate/Letters of Administration please provide us with the following information:

1.	The full name of the Deceased.	
2.	Last address of the Deceased.	
3.	Age and occupation of the Deceased at death.	
4.	Marital status of the Deceased.	
5.	Place of death.	
6.	Date of death.	
7.	Was the Deceased a permanent resident of NSW?	
8.	Your own full name and occupation (if retired, please state your last occupation)	
9.	Your relationship to the Deceased.	
10.	If you have any co-executors, please state their full names, addresses, occupations (or last occupations) and their relationship to the Deceased.	
11.	Please state the full names and addresses of all beneficiaries. If any beneficiaries are deceased, please state date of death in each case.	
12.	If the Deceased owned any real property, please state the address of each property and send the title deeds to us, or tell us where they can be inspected.	
13.	If the Deceased owned any leasehold property, please state the address of each property and send the leases to us, or tell us where they can be inspected.	
14.	If the Deceased owned a motor vehicle, please supply details and arrange for a valuation to be made by a motor dealer and sent to us.	
15.	If the Deceased owned furniture, a valuation may be required. Can you arrange for this to be done by a valuer if required or do you wish us to arrange this?	
16.	If the Deceased owned jewellery or watches, a valuation will also be required.	
17.	Please send us all bank pass books, bank statements, and cheque books of the Deceased.	

18. If the Deceased had any cash at the date of death, please state the amount and how it has been disposed of.	
19. If the Deceased was entitled to any wages, holiday pay or long service leave, please supply details.	
20. If the Deceased had any life or superannuation policies, please supply any details and send us the documents.	
21. If the Deceased owned any stock, shares, debentures or bonds, please supply details and send us the documents.	
22. Who handled the Deceased's income tax affairs?	
23. Did the Deceased have an interest in any other estate, or was the Deceased an executor in any other estate?	
24. If the Deceased had an interest in any business or partnership, please supply details.	
25. Were any debts due to the Deceased? If so, were there any securities on those debts? Please supply details.	
26. Did the Deceased make any gifts exceeding $300.00 in value during the 3 years prior to death? If so, please supply details.	
27. Did the Deceased have any life interest in any property?	
28. Was the Deceased a member of any funeral benefit fund, or any club conducting such a fund?	
29. Did the Deceased have any other assets of any kind?	
30. Did the Deceased owe any money at the date of death? If so, please supply full details, with particular reference to telephone, electricity or similar accounts.	

This document is provided for the use of clients and prospective clients of Teece Hodgson & Ward in relation to Estate Administration in New South Wales. Different information and considerations may be relevant in other jurisdictions and depending on your particular circumstances.

This document should not be used or relied other than for the purpose of instructing our firm.

April 2009