

KONZA LAW, LLC - PROBATE PROPERTY & INVENTORY WORKSHEET

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* Items owned by the deceased or in which s/he had an interest prior to death. This list is a guide and is not all inclusive. Take Pictures if possible.

Documents to Locate	Documents on Accounts & Money	Take Inventory
- Will or Trust Documents	- Savings Accounts	- Realty
- Powers of Attorney	- Checking Accounts	- Personal Property
- Real Estate Deeds	- Certificates of Deposit	- Safe Deposit Boxes
- Vehicle Registrations & Titles	- Money Market Accounts	- Vehicle Identification Nos
- Life Insurance Policies	- Mutual Funds	- Tagged or licensed trailers, boats, etc.
- Credit Life Policies (e.g. on credit cards)	- Security Deposits w/Landlord, Utilities, etc.	- Firearms
- Names & Addresses of ALL possible heirs (spouse, children, grandkids, parents, siblings, issue)	- Bonds - Stocks	- Jewelry, Coin & other collections
- Tax Returns for Last 5 years	- Retirement Accounts - 401k, Keough, IRAs, etc.	- Fitness Equipment
- Loan documents for ALL existing debts	- Life Insurance Residuals	- Major furnishings of the house
- Billing Statements for ALL existing debts	- Disability Payments	- Tools
- Lawsuits or judgments (for/vs)	- Inheritances not yet collected	- Equipment, Machinery, Fixtures
- Business Ownership Documents	- Annuities	- Livestock
- Incorporation/Shareholder Agreements	- Military Affiliation - DD214-check Register of Deeds	- Patents, copyrights, intellectual property
- Business Tax Returns	- Social Security Administration (check for benefits)	- Licenses, franchises
- Inventories	- Divorce Decree Property Settlements (to/by) Deceased	
- Accounts Receivable	- Child support owed (to/by) Deceased	- Property located in other states?
- Liabilities	- Marriage, birth & death certificates	- Funeral Arrangements by?
- Loans made by business to others	- Wages and tax refunds	- Care providers
- Books, Records & Financial Statements	- Leases & Rental Agreements	- Insurance for last illness? Health or other.
- Education Accounts	- Cancel credit & debit cards to prevent fraud.	- Funeral or Burial Plans