

## PROBATE/ADMINISTRATION CHECKLIST

Before attending an appointment please consider if:

- You have listed the names and address and contact details of all executors if there is a Will. In the event there is no Will please list related family members.
- You have the full and proper name and address of each beneficiary named in the Will. If there is no Will you have the names and contact details of the related family members even those who may not have been in contact with the deceased person.
- You have determined what assets will be available in the estate including jointly owned assets. Eg do you know the details of all assets or perhaps only some eg you know which bank the deceased used but NOT the account details. Please provide the details you have.
- You have checked life insurance policies and superannuation funds to determine what nominations have been made and whether they are binding or non-binding nominations.

Do not be concerned if you are unsure, we will help you through the process during your meeting with us.