

SUCCESSION CHECKLIST

☞ Please bring these papers and information to your interview

Death Information

- Death certificate
- Deceased person's Social Security Number
- Copy of will (if the deceased had one)

Family Relationships of Deceased Person

- Obituary or funeral program
- Marriage license (if available)
- If prior marriage(s), copies of divorce judgment(s)
- List of all deceased person's children, including:
 - Name
 - Date of Birth
 - Address
 - If not a child of the marriage, state whether father signed birth certificate, acknowledgment of paternity or adopted the child
- Any adoption or paternity acknowledgment papers for any of the deceased's children

Note: if a child died before the deceased, we will need the above information for that child's children

Deceased Person's Property

- Act of Sale or Deed for deceased person's house and other real estate
(You can get the Act of Sale from your parish courthouse or in New Orleans, from the Conveyance Office at the Convention Center)
- Assessed value of real estate (or most recent appraisal available)
- Title to cars, trucks, boats, trailers, etc.

- Bank accounts
- Stocks, bonds, mutual funds, certificates of deposit
- Safety deposit bank information (Do not enter the safety deposit box)
- Pension or retirement plan information

Deceased Person's Debts

- Funeral and cemetery costs
- List of all debts owed by deceased person at time of death, including:
 - Real estate mortgages
 - Car notes
 - Other loans
 - Credit cards
 - Income taxes
 - Medical bills

NOTE: WORK SHEETS FOR THE DECEASED PERSON'S FAMILY TREE AND PROPERTY AND DEBTS ARE ATTACHED—PLEASE COMPLETE

DECEASED PERSON'S FAMILY TREE

TABLE 1: Information of deceased person's spouses

SPOUSES OF DECEASED	DATE OF MARRIAGE	DATE OF DIVORCE OR DEATH

Address/Phone and Date of Birth of Surviving Spouse: _____

TABLE 2: Information on Deceased Person's Children

Children of Deceased & Social Security No.	Other Parent's Name	Address & Phone	Date of Birth	Date of Death (If dead, list his/her children in Table 3)

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TABLE 3: Information on children of any child listed in Table 2 above, who is dead

Child's Name & Social Security No.	Name of Child's Deceased Parent from Table 2	Address/Phone	Date of Birth	Date of Death

TABLE 4: Other persons listed in will

For anyone named in will, but not listed in Tables 1 to 3, provide information below

Name	Address/Phone	Under 18 years old (Yes/No?)	Date of Death

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DECEASED PERSON'S PROPERTY AND DEBTS

☞ List the deceased person's property and debts at the time of his/her death:

PROPERTY

	Identification No. or description	Location	Estimated value at time of death
Real Estate			
Stocks, bonds			
Notes, cash			
Cars, boats, trailers			
Insurance or annuities			
Furniture/Household goods			
Other property			

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DEBTS

☞ List the debts at amount due at time of death

	Creditor	Community or Separate Debt?	Amount due at death
Funeral & cemetery expenses			
Real estate mortgages			
Car loans			
Other Debts			