Probate / Trust Administration
Meeting Instructions

Appointment Date: ____/____/________ Appointment Time: __________

Meeting with: __________________________

This list has been prepared to assist you in planning for your upcoming meeting. To view, download, or print additional materials listed herein, please consult the "Meeting Instructions & Forms" page under the "Links and Forms" tab on our website at www.hhelderlaw.com. Alternatively, please feel free to contact a member of our staff at (317) 787-8395 and we will gladly mail, e-mail, or fax a packet to you.

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1) Please obtain and bring with you an original death certificate.

2) Please prepare a complete listing of the assets of the decedent as of his/her date of death using our "Asset Listing" form, or similar spreadsheet. Where possible, provide exact date of death values on accounts held by the decedent along with documentation from the holding institution reflecting these values.

3) Please prepare a list of debts and any known creditors of the decedent.

4) Please bring the original estate planning documents of the decedent as well as any existing estate planning documents of the surviving spouse (if applicable).
Generally, the term estate planning instruments can include the following:
   - Last Will & Testament
   - Trust Instrument
   - Power of Attorney
   - HIPAA Authorization
   - Living Will / Health Care Declaration

5) Please compile name, address, and telephone contact information for each beneficiary or fiduciary who is named in the decedent's Will or who is otherwise associated with an asset of the decedent.