

Estate Case File Documentation Checklist

Date: _____

To: [Recipient Name]

From: [Your Name]

Re: Estate Case File Documentation Checklist

Checklist of Required Documents

1. Death Certificate
2. Last Will and Testament
3. Trust Documents (if applicable)
4. Inventory of Assets
5. List of Debts and Liabilities
6. Birth Certificates of Heirs
7. Marriage Certificates (if applicable)
8. Tax Returns for the Last Three Years
9. Financial Statements
10. Living Will or Healthcare Proxy (if applicable)

Please ensure that all documents are gathered and submitted by **[Submission Deadline]**.

Should you have any questions, feel free to contact me at **[Your Contact Information]**.

Sincerely,

[Your Name]

[Your Title]

[Your Organization]