



# UPSTATE ESTATE LAW

## **Preparing for your Initial Consultation – Probate/Trust Administration**

*HERE ARE SOME THINGS YOU CAN DO TO PREPARE FOR YOUR INITIAL PROBATE OR TRUST ADMINISTRATION CONSULTATION WITH UPSTATE ESTATE LAW, PA*

1. Bring copies of the decedent's estate planning documents and death certificate, if available.
2. Prepare a list of assets owned by the decedent, and indicate how each asset was owned jointly, individually, in trust, etc.) and the approximate value of each. Please also include a list of all known debts of the decedent. We understand that this information may be difficult to obtain, so do not worry about providing a complete list at this time.
3. Prepare a list of the decedent's spouse and children and their current addresses.
4. Prepare a list of the decedent's beneficiaries (those who have been named in the decedent's estate planning documents, if any) and their current addresses.
5. Bring contact information for the decedent's accountant, financial advisor, and insurance agent.
6. Prepare a list of your concerns and questions about the probate/trust administration process. Here are some examples of questions many clients have during their consultation:
  - What percentage of your practice is devoted estate and trust administration?
  - The decedent died without a will - how does that affect administration of the estate?
  - How will the estate be affected by estate and income taxes?
  - How may I act on behalf of the decedent?
  - What happens if there are claims against the estate/trust?
  - How long does administration of the estate/trust take?
  - Am I entitled to compensation for serving as personal representative/trustee?



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- Will anyone else be working on my case?
- How are your hours billed?