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## ***ESTATE ADMINISTRATION REQUEST FOR REQUIRED DOCUMENTS***

***An Inheritance Tax Return must be filed with the PA Department of Revenue within nine (9) months from the date of death for every decedent who has property in their name.***

***An Inventory of the decedent's assets must be filed with the Register of Wills Office within nine (9) months from the grant of Letters of Administration/Testamentary.***

***I will need a copy of all account statements that represent an asset or a debt of the decedent:***

- 1. Real Estate Deeds, Appraisals, Tax Assessment invoices, Property Insurance**
- 2. Bank Accounts (checking & savings), Certificate of Deposit, Stocks or Bonds**
- 3. Retirement Accounts, IRA's, Annuities or Pension Plans with name & relationship of beneficiary**
- 4. Personal Property, Automobiles, Mortgages or Notes Receivable**
- 5. Jointly-Owned Property, Bank Statements and Real Estate Deeds**
- 6. Accounts held "in trust for" or "pay on death" or "rights of survivorship"**
- 7. Transfers made to another within one (1) year of decedent's death**
- 8. Transfers in which decedent reserved a life interest**
- 9. Funeral Expenses & Services, Repast, Flowers, Burial Plot & Gravestone**
- 10. Debts of decedent (all bills including- medical, credit cards, utilities, etc.)**
- 11. Liabilities, Liens, Real Estate Insurance, Obligations of any kind**
- 12. List of Beneficiaries, names, addresses, phone numbers and email addresses**
- 13. Death Certificate for Decedent and all deceased person(s) associated with estate**
- 14. Closely-Held Corporation, Partnership or Sole-Proprietorship interests**
- 15. Trust documents – Revocable, Irrevocable, Special Needs, Charitable or any other**
- 16. Any and ALL documents held in decedent's name alone or jointly with another**

**\*\* Copies of these documents can be sent via email [ohstoner@aol.com](mailto:ohstoner@aol.com) or fax 215-557-0027 \*\***