

E-PROBATE Check List

Before beginning the data entry, please have the following available:

1. Your credit card.
2. A copy of the will (Note if it is a Standard or Self Proving will A Self Proving will has the witness forms already signed)
3. A copy of the death certificate
4. The number of surrogate certificates you require. (You need a certificate to gain access to each bank/broker account, safety deposit box, etc.)
5. The decedent's name, address and date and place of death
6. Decedents aliases – (e.g., bank account using a different spelling of the decedent's name)
7. The name and address of the following parties:
 - a. Executors and executrixes
 - b. Relatives that have standing before the court (Distributees). See list below. Include all with a value of 1 or 2. If there are no relatives with a value of 1 or 2, include all surviving relatives within the category having the next LOWEST value (e.g., if a fifteen year old passes, then those with a value of 3 (mother and father) will be the Distributees)
 - c. All other parties mentioned in the will; these are designated as parties to be notified
 - d. Witnesses
8. The value of probate assets (Do not include the value of property which passes outside the estate by operation of law such as: 1. joint property 2. pension benefits or life insurance policies having a living named beneficiary 3. unrevoked Totten trusts 4. real property owned as a tenant by the entirety with decedent's surviving spouse or any exempt property passing under EPTL §5-3.1).
 - a. Personal assets
 - b. Unimproved property
 - c. Improved property
 - d. Next 18 months of rent
9. For each Trust that is established by the will, you need 1. Name of trust, 2. Trust beneficiary(ies) name(s) and address(es) and 3. Trustee(s) name(s) and address(es).

Relation to Decedent	Hierarchial Value
Spouse	1
Son	2
Daughter	2
Father	3
Mother	3
Brother	4
Sister	4
Niece/Nephew	5
GrandParent	6
Grandchild	6
Aunt/Uncle	7
Cousin	8
Cousin's Child	9
Non-Marital Son	10
Non-Marital Person	11

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