

Checklist: Preparing to see a lawyer

You can print this checklist to help you remember the things you should take with you to your first meeting with a lawyer about dealing with a deceased's estate.

What to take:

<input type="checkbox"/> The will	<ul style="list-style-type: none">• original or photocopy if the original can't be located• contact details of beneficiaries, if known
<input type="checkbox"/> Death certificate	<ul style="list-style-type: none">• original or certified copy of the Death Certificate
<input type="checkbox"/> Bank accounts	<ul style="list-style-type: none">• statements, passbooks, debit cards• any other account held in the deceased's name
<input type="checkbox"/> Unpaid bills	<ul style="list-style-type: none">• utilities (for example, electricity gas, telephone)• rent
<input type="checkbox"/> Cars, boats, caravans	<ul style="list-style-type: none">• make and model• registration papers• estimated market value• insurance policies
<input type="checkbox"/> Shares	<ul style="list-style-type: none">• name of company• number and class of shares• certificates• dividend payments or statements
<input type="checkbox"/> Real estate	<ul style="list-style-type: none">• addresses of all properties owned by the deceased

	<ul style="list-style-type: none"> • type of ownership (sole, joint tenancy or as tenants in common) • location of title deed • estimated market value
<input type="checkbox"/> Liabilities	<ul style="list-style-type: none"> • details of any home loans or mortgages • personal loans and car finance loans • credit card debts and store cards • outstanding bills for mobile phone, household utilities, council rates, water rates and strata levies • taxation debts, including HELP debts • other debts owed to another person/company
<input type="checkbox"/> Funeral account	<ul style="list-style-type: none"> • invoice or receipt (if paid)
<input type="checkbox"/> Insurance policies	<ul style="list-style-type: none"> • details of any health or life insurance policy
<input type="checkbox"/> List of questions	<ul style="list-style-type: none"> • legal costs • payment method