Decedent's Property Worksheet

This worksheet is provided by State Employees' Credit Union to assist persons handling an estate with creating an inventory of the decedent's personal information and property. This worksheet is intended for the purpose of gathering and organizing information to assist with the estate administration process, and should not be considered an official record of the decedent's estate.

Personal Information of Decedent			
Name		SSN	
Street Address		County	
City, State ZIP		Did the decedent have a will?	☐ Yes ☐ No

Heirs/Devisees of the Decedent's Estate			
Name	Contact Information	Relationship	Age

Creditors of the Decedent's Estate			
Name	Contact Information	Description	Amount

Financial Information of Decedent*

**Be sure to consider accounts that may have electronic access only*

Checks Payable to Decedent or Estate of Decedent

Description	Amount
Amount of Cash Found with Decedent’s Belongings (if any)	

Deposit/Brokerage Accounts*

**Ownership of these accounts will determine whether the accounts are probate or non-probate assets*

Financial Institution	Account Number	Balance	Ownership

Existing Utilities/Bills, Account drafts, etc.

**Use this information to determine what services require cancellation.*

Company	Account Number	Balance	Contact Information

Retirement Accounts *Ex. 401k, IRA, Annuities, etc.*			
Financial Institution	Account Number	Balance	Beneficiaries

Stocks and Bonds **Registration (ownership) will determine whether the accounts are probate or non-probate assets*			
Issued By	Certificate No.	No. of Shares	Ownership

Life Insurance			
Company	Policy Number	Amount	Beneficiaries

Business Interests *Ex. Sole Proprietor, Partnership, LLC, etc.*			
Name of Business	Type	Value	Description

Real Property Owned by Decedent

Property Address	County	Ownership	Value	Mortgage Amount

Personal Property owned by Decedent

Motor Vehicles, Boats, Trailers, etc.

VIN	Year, Make and Model	Value	Lien Amount

Other Personal Property

Ex: Jewelry, Collections, Artwork, Antiques, Special Household Items, etc.

Description	Value