

INHERITANCE NECESSARY DOCUMENTATION

The following is a list of the documentation or items that will be required for the successful completion and release of payment for Inheritance transactions.

Inheritance Information Checklist

- Applicant's Driver's License
- Applicant's Social Security Card
- Petition for Probate
- Notice of Petition to Administer Estate
- Inventory and Appraisal (or statement of assets and liabilities)
- Will and/or Trust
- Death Certificate
- Documents for any loans or assignments previously made against inheritance
- Listing Agreement or Sales Contract (if real property)
- Property Insurance (if real property)
- Title Report (if real property)

** Please note that there may be additional requests if necessary to properly process and complete the transaction