



TRAIL Associates

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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 Appraisalment (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

Partnering for Success

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