



# HARRY MARSH LAW

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## Estate Planning Overview

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While we do not handle estates directly at Harry Marsh Law, we have put together some resources that can assist as you go through the estate process. Below you will find some general guidelines to help streamline the process

### *What to identify up front*

- Is the estate **testate** (*certified will*) or **intestate** (no certified will)
- What type of estate will you need to file?
  - Simple/Small
  - Summary Administration
  - Full

### *Estate Needed Documents and Information*

*\* Please note that depending on your individual situation not all of these documents may be applicable or required*

- Original or Certified Will ( if applicable)
- Original or Certified Death Certificate
- Obituary
- Funeral Bill and Receipt
- Heir(s) Information
  - Copy of Drivers License, Passport or State Issued ID
  - Spouse Name (if applicable)
  - Phone Number
  - Address
  - Email Address (if applicable)
  - SSN (needed for all heirs **receiving** money)
- Copy of Drivers License for Executor/Administrator and any additional heirs
- Decedent Bank Account Information
  - Name of banking institutions and account amounts

### *Filing Your Estate With The County*

You will need to schedule an appointment with the Mecklenburg County Estates Dept. We recommend you bring any and all documents and information you have to your first appointment. They will be able to assist you in finding the proper documents required to file for your specific case.