What should I bring to my first probate attorney meeting?

Start with one call. Ask the office what it wants you to bring and how to provide it. You can say:

“I’m arranging a first meeting about a family member’s estate. What documents and information would you like me to have ready?”

Write down the appointment details and any instructions. If something is missing, say so. Don’t delay asking for help until every blank is filled.

Appointment / contact / instructions

Probate Happens™ · Free sample · Meeting preparation · Educational information, not legal advice.

Gather what you already have.

Ask the office which of these it needs and whether to bring originals, copies or secure digital files.

- Any will or estate-planning documents you have
- Death certificate information, if available
- Any court notices or letters received
- Names and contact information you already know
- A general list of property, accounts and bills
- Questions about anything you cannot find

Keep private information private. Don’t put passwords, account numbers or family documents into an ad form or send them to Probate Happens. Ask the attorney’s office how to share sensitive records securely.

What I have / where it is

Write the questions you want answered.

Examples to adapt to your situation:

- What do you need to understand our situation?
- Who has authority to take the next steps?
- Is anything time-sensitive?
- How do your fees and communication work?
- What should we do after this meeting?

My three most important questions

What I’m unsure about

Make the conversation easier to follow.

Keep a short list of what you know, what is missing, and what the office asked you to bring. After the meeting, note the agreed next steps.

Missing information / who I can ask

After the meeting: action / person / date

Want more room to organize? The Attorney-Ready Starter Pack includes a 26-page PDF plus an editable Word workbook. $19.95, purchased separately. No subscription required.

Educational organizing tool. Not legal advice. Follow your attorney’s instructions.