

EXHIBIT B

INVENTORY CHECKLIST

- _____ Completed Inventory form with original signature(s), together with one copy.
- _____ Form is signed by each fiduciary – original signature(s) required. Please sign in blue ink.
- _____ Box “A” or “B” is marked on page 3. If box “A” is marked, page 4 must be completed and signed by each fiduciary (original signature(s) required).
- _____ Contact information is current, including an email address.
- _____ The name of each bank and/or brokerage account is reflected.
- _____ The last 4 digits of each bank and/or brokerage account number is listed (i.e., XXXX-1234).
- _____ Each asset in a brokerage account (i.e., name of stock/equity, number of shares and price per share) is listed separately. An additional page may be attached if necessary.
- _____ Joint holder(s) name(s) is listed for any account reflected in part 2 of the form, in addition to bank name and last four (4) digits of account number.
- _____ Street address or tax ID is reflected for any real property listed in part 3, 4 or 5 of the form.
- _____ Copy of the Last Will and Testament, if decedent died testate, is provided.
- _____ Date of birth for each beneficiary, if an age of distribution is referenced in the Will, is provided.
- _____ Copy of the Revocable Trust document, if any assets are distributed to a Revocable Trust, is provided.
- _____ Filing Fee included. Check should be made payable to the Commissioner of Accounts. We are unable to accept credit cards.