

LIST OF DOCUMENTS TO BE PROVIDED FOR A SUCCESSION

CIVIL STATUS

- Two originals of the death certificate
- Family record book of the deceased
- Marriage contract of the deceased (if there is a change of matrimonial regime during the union, provide a copy)
- Copy of the deceased's divorce decree and/or legal separation
- PACS contract of the deceased and proof of registration of the PACS
- Full copies of the family record book of the heirs, including the pages mentioning the children, and contact details (telephone numbers, addresses, emails, etc.) of the heirs
- Disability card if one of the heirs is disabled
- Copy of the donation between spouses (to the last living person) and/or of the will at the Notary's office (if you have the original of the deceased's will, you must hand it over to the Notary when the file is opened at the office).
- Copy of the adoption judgment (if adopted children).

ASSETS

- A bank statement (for each bank and account)
If married under a community regime, also provide the spouse's account statements. Pension numbers and addresses of the funds.
- Pension numbers and addresses of the funds
- Title deeds to each property
- If rented: copy of the lease and name and address of the manager if the property is managed
- Name and address of co-ownership trustees
- Title deeds to any business
- Up-to-date articles of association of any company in which the deceased is a partner and details of the accountant drawing up the balance sheets, if applicable
- Registration document for the motor vehicle(s)
- Life insurance policies (statement from the company specifying the name of the subscriber and the policy number)
- Insurance policies for valuables (if valuable furniture or jewellery has been specifically insured, with a copy of the valuation)

Other assets

(1) in the case of the death of a person married under the community regime, also provide the same elements that may appear in the name of the surviving spouse.

LIABILITIES

- Last income tax return
- Last ISF or IFI tax return
- All tax notices for the year of death or the previous year if tax notices for the current year have not yet been issued (property tax, council tax, CSG-CRDS, etc.)
- Loans outstanding on the day of death (copy of the loan contract and amortisation table).
- Miscellaneous liabilities (various bills, sums due on the day of death and not paid at the time of death or paid by the heirs after the death: housekeeper, electricity, telephone, etc.).

MISCELLANEOUS

- Previous donations (manual donations with registration mentions and authentic donations): copy of the donation deeds
 - Less than 15 years old
 - And more than 15 years old
- Assets acquired by inheritance or donation by the deceased or his/her spouse: copy of all the notarial deeds (notoriety, declaration of option, real estate certificate, division, declaration of inheritance, etc.) and statement of the inheritance account of the notary who received the deeds.