

OPENING OF SUCCESSION

The settlement of an inheritance often seems very long: this is due to the fact that a large quantity of varied information must be gathered.

Your help can help us to shorten deadlines, and above all, to comply with the tax administration for filing the inheritance declaration and paying any inheritance tax that may be due.

Documents concerning the deceased

- Family records,
- The marriage contract and the changes made to the matrimonial regime,
- The will,
- Donation between spouses.

Documents concerning heirs

- Family records,
- A copy of the marriage contract, the PACS agreement or the divorce judgment if applicable,
- The double-sided copy of the identity card, passport or residence permit.

Documents concerning the assets of the estate

- References of savings bank books, personal and joint bank accounts or investment accounts,
- The list of stock market values (name, address of banks and brokerage companies),
- Life insurance contracts, death insurance contracts,
- Insurance policies for furniture, works of art and jewelry,
- Pensions and retirements (latest payment slip),
- Property titles, valuation of buildings and contact details of the trustee,
- The copy of the rental contracts, the amount of rent and the contact details of the manager (if the deceased was lessor),

- The list of donations made by the deceased and copies of the deeds,
- The vehicle registration document,
- The statutes of the companies in which the deceased held shares and contact details of the accountant,
- The list of works leading to the collection of copyright,
- Copy of the ISF declaration

Documents concerning the estate's liabilities

- Tax notices (on income, ISF, property tax, housing tax),
- Funeral expenses,
- Water receipts, EDF-GDF, telephone,
- Rent (if the deceased was a tenant),
- Condominium fees,
- Loans and guarantees,
- Information concerning the possible recovery of certain aid benefits social,
- Last illness costs,

Documents concerning the spouses' own property

If the spouses are married under a community regime, separate property means property acquired before marriage or received by gift and inheritance during the marriage. To justify the rights of each spouse, you must submit:

- The act of sharing the inheritances collected by the spouses,
- A copy of the inheritance declarations collected (name and address of the notary who paid them);
- Copies of donations collected during the marriage,
- The list of works paid for by the community and relating to its own property.