

## Suggested Check List:

Estate of \_\_\_\_\_

Address \_\_\_\_\_

Social Security No. \_\_\_\_\_

Tax ID No. \_\_\_\_\_

Attorney \_\_\_\_\_

Age at death \_\_\_\_\_

Probate No. \_\_\_\_\_

Date of Death \_\_\_\_\_

Date of Appointment \_\_\_\_\_

Co-Executor \_\_\_\_\_

Accountant \_\_\_\_\_

COMPLETED

Counsel with and/or hire attorney \_\_\_\_\_

Probate will \_\_\_\_\_

Obtain certified copy of will and "letters  
testamentary" or post bond and obtain letters  
of administration \_\_\_\_\_

Notify beneficiaries \_\_\_\_\_

Apply for tax identification number \_\_\_\_\_

Publish notice to creditors \_\_\_\_\_

Provide funds for family or petition for a year's  
support \_\_\_\_\_

Check property insurance \_\_\_\_\_

File change of address if necessary \_\_\_\_\_

- Inventory properties and arrange for storage of valuables \_\_\_\_\_
- Decide what to do with automobiles \_\_\_\_\_
- Discontinue charge accounts and utilities when appropriate \_\_\_\_\_
- Request authority from court to continue business \_\_\_\_\_
- Check on company benefits and unpaid salary with employer \_\_\_\_\_
- Settle brokerage accounts \_\_\_\_\_
- Contact bank and savings associations \_\_\_\_\_
- Open fiduciary bank account and invest excess funds \_\_\_\_\_
- Inventory safe deposit boxes \_\_\_\_\_
- Notify dividend and interest paying agents or transfer securities \_\_\_\_\_
- Determine which property passed directly \_\_\_\_\_
- Get information on real estate \_\_\_\_\_
- Examine personal records and tax returns \_\_\_\_\_
- Pay funeral expenses \_\_\_\_\_
- Determine if there are other debts to be paid \_\_\_\_\_
- File for insurance and obtain IRS Form 712 \_\_\_\_\_
- File for social security, civil service, veterans or other benefits \_\_\_\_\_
- Have appraisers appointed and/or appraise property \_\_\_\_\_
- File inventory and appraisal \_\_\_\_\_
- Determine cash needs \_\_\_\_\_
- Pay appraiser's fee \_\_\_\_\_

- Consider distribution or sale of personal property \_\_\_\_\_
- Notify beneficiaries \_\_\_\_\_
- File income tax returns \_\_\_\_\_
- Consider marker or monument \_\_\_\_\_
- Employ a co-executor or administrator if necessary \_\_\_\_\_
- Explain to widow her right to elect \_\_\_\_\_
- Check for claims and provide reserve funds to pay expenses and other costs \_\_\_\_\_
- Request payment for attorney's and personal representatives fees \_\_\_\_\_
- File Inheritance and Estate Tax Returns \_\_\_\_\_
- Consider payment of specific bequests and distribution of some residue \_\_\_\_\_
- Consider appointment of guardian or someone to serve while court action is pending \_\_\_\_\_
- File accounts with vouchers \_\_\_\_\_
- Petition for order of distribution to heirs \_\_\_\_\_
- Distribute to heirs and obtain receipts \_\_\_\_\_
- Pay costs, obtain discharge \_\_\_\_\_