



Probate Checklist

- Secure Any Real Estate
 - Post No Trespassing Notice (If real estate is vacant)
 - Obtain Vacant Property Insurance Rider (If real estate is vacant)
 - Make Sure Real Estate & Personal Property Is Locked Up & Secure
- Obtain The Death Certificate
- Get A Copy Of The Will (if applicable)
- Notify Life Insurance Company(ies) Of The Death
- Decide On Attorney Representation (unless filing pro-se, ie. filing without legal counsel)
- Determine Which Level Of Probate Is Necessary For The Estate
- File Probate With The County Clerk
- Run A Notice To Creditors In Newspaper
- Set Up A Bank Account For The Estate
- Set Up Auto-Pay Mortgages, Utilities & Similar Bills Paid Through Disposition
- Determine Legality & Timeframe For Selling Real & Personal Property
(speak with a Probate attorney and a real estate professional who is familiar with Probate)
- Clean Out Any Real Property
 - Have Any & All Real Property (real estate) Repaired & Maintained
 - Lawn & Landscape Maintenance
 - Gutter Cleaning
 - Painting & Exterior Trim Repair
 - Mechanical Servicing Such As HVAC, Water Heaters, & Appliances
 - Interior Repairs & Maintenance Such As Plumbing, Electrical, Condition Upgrades, etc.
 - Identify & Divide Personal Property That Heirs Will Keep
 - Arrange For An Estate Sale Of Any Valuable Property That The Heirs Don't Want
 - Donate clothing & belongings that the heirs don't want to sell or keep
 - Schedule Cleanout Company To Dispose Of All Non-Valuable Items That The Heirs Don't Want
 - Arrange For A Final Cleaning Of The Property(ies)
- Sell Or Rent Any Real Estate Desired

Please use this checklist to help alleviate any stress you may be facing. I am here to help you every step of the way as you navigate this hard time, **you don't have to face it alone.**

- Start An Inventory Of Assets
 - Life Insurance _____

 - Investment Accounts _____

 - Checking & Savings Accounts _____

 - Employer Pay (ex: final paycheck, death benefits, etc.) _____

 - Debts _____

 - Valuable Personal Property _____

 - Real Estate (Equity) _____

 - Real Estate (Mortgages) _____

 - Other: _____
- Notify Known Creditors & Obtain Payoff Information - Have Them Discontinue The Accrue ment Of Interest
- Notify The Social Security Administration & Ensure Survivors Receive Benefits (If applicable)
- Finalize an asset distribution plan
 - Pay the estates final debts
 - Dispose of assets not going directly to heirs
 - Ensure the final distribution of assets to heirs in the will or according to state intestacy laws
- Pay the estates taxes
- Close the estate
- Close the estate bank account after all debts are settled and money is distributed
- File a final accounting with the probate court and ask for the estate to be closed