

PROBATE CHECKLIST

A simple, step-by-step guide to the practical side of probate, from securing the property to closing the estate. Keep this nearby and check things off as you go. You don't have to do this alone.

- ☐ **Secure Any Real Estate**
 - ☐ Post No Trespassing Notice (if vacant)
 - ☐ Obtain Vacant Property Insurance Rider (if vacant)
 - ☐ Make Sure Real Estate & Personal Property Is Rekeyed & 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**
- ☐ **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**
 - ☐ 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 the Heirs Will Keep**
- ☐ **Arrange for an Estate Sale of Any Valuable Property the Heirs Don't Want**
- ☐ **Donate clothing & Belongings the Heirs Don't Want to Sell or Keep**
- ☐ **Schedule Cleanout Company to Dispose of All Non-Valuable Items the Heirs Don't Want**
- ☐ **Arrange for a Final Cleaning of the Property(ies)**
- ☐ **Sell or Rent Any Real Estate Desired**
- ☐ **Start an Inventory of Assets**
 - ☐ Life Insurance:

 - ☐ Investment Accounts:

 - ☐ Checking & Savings Accounts:



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We'll walk you through the entire process. **You're never alone!**

PROBATE CHECKLIST CONT.

☐ Employer Pay:

☐ Debts:

☐ Valuable Personal Property:

☐ Real Estate (Equity)

☐ Real Estate (Mortgages):

☐ Other:

- ☐ **Notify Known Creditors & Obtain Payoff Information — Have Them Discontinue the Accrualment 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**



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