

**ESTATE ADMINISTRATION CHECKLIST
FOR THE SURVIVING FAMILY MEMBERS
ACTIONS TO BE TAKEN IMMEDIATELY FOLLOWING A DEATH**

	<u>N/A</u>	<u>To Be Done</u>	<u>Done</u>	<u>Responsible Person</u>
1. Determine if a body or organ donor and contact the organization	_____	_____	_____	_____
2. Check if any pre-arrangements for the funeral	_____	_____	_____	_____
3. Arrange for funeral, burial and services	_____	_____	_____	_____
4. Notify Social Security Administration: 800.772.1213; IRS: 800.829.1040	_____	_____	_____	_____
5. Notify the DMV	_____	_____	_____	_____
6. Check if any social security or Veterans' burial benefits	_____	_____	_____	_____
7. Notify relatives, friends and newspapers	_____	_____	_____	_____
8. In obituaries, don't include the deceased's birth date, place of birth, last address or job	_____	_____	_____	_____
9. Safeguard perishable items such as pets and food	_____	_____	_____	_____
10. Secure computer passwords	_____	_____	_____	_____
11. Safeguard valuable tangible personal property such as jewelry, art work, etc.	_____	_____	_____	_____

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|------------|--|-------|-------|-------|
| 12. | Secure decedent's residence _____ | _____ | _____ | _____ |
| 13. | Check on fire and casualty insurance on decedent's residence and other property and make sure insurance is maintained _____ | _____ | _____ | _____ |
| 14. | Discontinue utility and telephone, if necessary _____ | _____ | _____ | _____ |
| 15. | Close all decedent's charge accounts _____ | _____ | _____ | _____ |
| 16. | Immediately send death certificate copies by certified mail to the three main credit reporting bureaus. Request that a "Deceased alert" be placed on the credit report _____ | _____ | _____ | _____ |
| 17. | Mail copies as soon as possible to banks, insurers and other financial firms requesting account closure or change of joint ownership _____ | _____ | _____ | _____ |
| 18. | Close social media accounts and cell phones _____ | _____ | _____ | _____ |
| 19. | File change of address with the post office _____ | _____ | _____ | _____ |
| 20. | Prepare inventory of safe deposit box _____ | _____ | _____ | _____ |

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|------------|--|-------|-------|-------|-------|
| 21. | Obtain all records of decedent's assets, including: | | | | |
| | (a) Real estate | _____ | _____ | _____ | _____ |
| | (b) Stocks and bonds | _____ | _____ | _____ | _____ |
| | (c) Mortgages, notes & cash | _____ | _____ | _____ | _____ |
| | (d) Insurance | _____ | _____ | _____ | _____ |
| | (e) Jointly owned property | _____ | _____ | _____ | _____ |
| | (f) Other miscellaneous property | _____ | _____ | _____ | _____ |
| | (g) Transfers during decedent's life (gifts) | _____ | _____ | _____ | _____ |
| | (h) Powers of appointment | _____ | _____ | _____ | _____ |
| | (i) Annuity | _____ | _____ | _____ | _____ |
| 22. | Collect decedent's: | | | | |
| | (a) Life insurance | _____ | _____ | _____ | _____ |
| | (b) Salary | _____ | _____ | _____ | _____ |
| 23. | Review will or state law if no will | _____ | _____ | _____ | _____ |
| 24. | Make probate appointment with an attorney | _____ | _____ | _____ | _____ |
| 25. | Appoint the executor or administrator | _____ | _____ | _____ | _____ |
| 26. | Obtain letters of appointment as an executor or administrator | _____ | _____ | _____ | _____ |
| 27. | File Form SS-4, Application for Employer Identification Number, for estate | _____ | _____ | _____ | _____ |
| 28. | Open estate checking account | _____ | _____ | _____ | _____ |
| 29. | Close decedent's bank account(s) and transfer funds to estate account | _____ | _____ | _____ | _____ |
| 30. | Starting a month after the death, check the departed's credit report at annualcreditreport.com for suspicious activity | _____ | _____ | _____ | _____ |

31. Pay decedent's debts:

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|--------------------|-------|-------|-------|-------|
| (a) Funeral | _____ | _____ | _____ | _____ |
| (b) Doctors | _____ | _____ | _____ | _____ |
| (c) Hospitals | _____ | _____ | _____ | _____ |
| (d) Rents | _____ | _____ | _____ | _____ |
| (e) Income taxes | _____ | _____ | _____ | _____ |
| (f) Property taxes | _____ | _____ | _____ | _____ |
| (g) Nursing homes | _____ | _____ | _____ | _____ |
| (h) Gas | _____ | _____ | _____ | _____ |
| (i) Loans | _____ | _____ | _____ | _____ |
| (j) Credit card | _____ | _____ | _____ | _____ |
| (k) Mortgage | _____ | _____ | _____ | _____ |
| (l) Other | _____ | _____ | _____ | _____ |