PERSONAL REPRESENTATIVE'S

# Probate Checklist

www.workplanmommy.com

*this is not an exhaustive probate checklist for personal representatives. You should always consult with an attorney for your personal circumstances. This checklist is merely informational and educational.

## FIDUCIARY

- [ ] Track all time
- [ ] Track all expenses
- [ ] Track all mileage
- [ ] **Hire counsel**

## CALENDAR TAX RETURNS**

- [ ] Form 706 (if applicable)
- [ ] Annual 1041 (if applicable)
- [ ] Alternate Valuation Date

**always consult with a tax professional about your tax situation

## COLLECT ASSETS

- [ ] Collect/organize paperwork
- [ ] Forward mail
- [ ] Insure assets
- [ ] Inquire about accounts

## PROTECT REAL PROPERTY

- [ ] Change house locks
- [ ] Order Appraisal
- [ ] Contract with realtor if selling

## BENEFICIARIES INFORMATION TO COLLECT

- [ ] Names, Addresses, Telephones
- [ ] Social Security Numbers
- [ ] Ages

## VALUATION

- [ ] Appraise all real property
- [ ] Value all personal property
- [ ] Collect account values as of the date of death

## NOTES

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## NOTICES

- [ ] Beneficiaries
- [ ] Creditors, Social Security,
- [ ] Medicaid
- [ ] Local Newspaper

## ESTATE ACCOUNT

- [ ] Acquire EIN for Estate
- [ ] Open Separate Estate Checking
- [ ] Account
- [ ] All liquid assets to Estate Account

## INVENTORY AND CREDITORS

- [ ] Inventory all assets
- [ ] Pay all legal claims and creditors

## SELL OR LIQUIDATE

- [ ] Sell Real and Personal Property
- [ ] Conduct an auction or sale
- [ ] Liquidate Accounts into Estate Account

## ACCOUNTING

- [ ] Assets
- [ ] Expenses
- [ ] Receipts
- [ ] Future Expenses

## DISTRIBUTION

- [ ] Collect consents to accounting
- [ ] Distribute assets in cash or kind
- [ ] Collect receipts for transfers

## NOTES

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