



# 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