**ESTATE ADMINISTRATION CHECKLIST**

**for the Surviving Family Members**

**ACTIONS TO BE TAKEN IMMEDIATELY FOLLOWING A DEATH**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  |  | **N/A** | **To be Done** | **Completed** | **Responsible Person** |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
| 1. | Determine if a body or organ donor and contact the proper 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, do not include the deceased’s birth date, place of birth, last address or job | \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_ |
| 9. | Safeguard perishable items such as food | \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_ |
| 10. | Make arrangements to keep pets safe | \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_ |
| 11. | Security computer passwords | \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_ |
| 12. | Safeguard valuable tangible personal property such as jewelry, art work, etc. | \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_ |
| 13. | Secure decedent’s residence | \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_ |
| 14. | Check on fire and casualty insurance on decedent’s residence and other property and make sure insurance is maintained | \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_ |
| 15. | Discontinue utility and telephone, if necessary | \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_ |
| 16. | Close all decedent’s charge accounts | \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_ |
| 17. | 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 | \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_ |
|  |  | **N/A** | **To be Done** | **Completed** | **Responsible Person** |
| 18. | Mail copies as soon as possible to banks, insurers and other financial firms requesting account closure or change of joint ownership | \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_ |
| 19. | Close social media and cell phone accounts | \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_ |
| 20. | File change of address with the post office | \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_ |
| 21. | Prepare inventory of safe deposit box, if applicable | \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_ |
| 22. | Obtain all records of decedents’ assets, including:  (a) Real estate  (b) Stocks and bonds  (c) Mortgages, notes & cash  (d) Insurance  (e) Jointly owned property, if applicable  (f) Other miscellaneous property  (g) Transfers during decedent’s life (gifts)  (h) Powers of appointment  (i) Annuity | \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_ | \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_ | \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_ | \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_ |
| 23. | Collect decedent’s:  (a) Life insurance  (b) Salary | \_\_\_\_\_  \_\_\_\_\_ | \_\_\_\_\_  \_\_\_\_\_ | \_\_\_\_\_  \_\_\_\_\_ | \_\_\_\_\_  \_\_\_\_\_ |
| 24. | Review will or state law if no will | \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_ |
| 25. | Make probate appointment with an attorney | \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_ |
| 26. | Appoint the executor or administrator | \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_ |
| 27. | Obtain letters of appointment as an executor or administrator | \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_ |
| 28. | File Form SS-4, Application for Employer Identification Number, for estate | \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_ |
| 29. | Open estate checking account | \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_ |
| 30. | Close decedent’s bank account(s) and transfer funds to estate account | \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_ |
| 31. | Starting a month after the death, check the departed’s credit report at annualcreditreport.com for suspicious activity | \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_ |
|  |  | **N/A** | **To be Done** | **Completed** | **Responsible Person** |
| 32. | Pay decedent’s debts:  (a) Funeral  (b) Doctors  (c) Hospitals  (d) Rents  (e) Income taxes  (f) Property taxes  (g) Nursing home(s)  (h) Gas  (i) Loans  (j) Credit card(s)  (k) Mortgage  (l) Other | \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_ | \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_ | \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_ | \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_ |