



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



☐ 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 Accrueement 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