Estate Settlement.com

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POST FUNERAL PLANNING CHECKLIST

*** Preliminary Not A Complete List**

Items to Find and Secure: The Last Will and Testament and Trust Documents. Keys to safe deposit box. Life insurance policies. Business partnership agreements. Decedent's checkbook, ATM card, credit cards & address book. Bank account statements. Marriage certificate. Veterans records. Retirement plans and employment records. Tax returns. Important & valuable family keepsakes. Other important documents. (Circle those that apply) VISIT: **www.EstateSettlement.com**

Notes:____

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Items to Accumulate: Current monthly bills, medical bills, bank statements. Checks received in the name of the decedent. Keep receipts for funeral expenses and any "out of pocket" estate expenses. Executor, accumulate list of assets and liabilities and debts. Note due dates on bills. Note the legal title descriptions on all accounts, assets and debts. Take pictures of home for quick inventory of contents (with no surviving spouse).

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Contact: Family and Friends that could not be reached for funeral. Contact minister, priest or other support resource. Contact Estate Attorney (FL probate law requires an Attorney). Executor or Attorney to deliver Last Will & Testament to probate court. Contact: Accountant, Social Security, Veterans Administration. Insurance companies (regarding life, health, property insurance & annuities).

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Family Care Issues: Be mindful of family member bereavement issues and healthcare. Maintain security of home and property. Note family "issues" or disputes. Spouse may use joint account to pay bills, but others should not use decedent's checkbook, credit cards or ATM card or auto. *Consider a memorial or donation that the; family, beneficiaries and Personal Representative believe to be a fitting remembrance.*

Starting the Probate Process and Responsibilities: Getting the Will to the probate court will allow the Personal Representative (upon appointment) to pay bills. Probate assets (assets held in decedent name) or personal property items should not be distributed to beneficiaries without court approval. Executor, Personal Representative (or Attorney) should maintain possession & control of property and all important records and documents.

Notes: ____

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*** Seek the advice of an Estate Administration Attorney before taking any action.**

Pilka & Associates, PA

Estate Administration & Trust Planning Services

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www.Pilka.com

213 Providence Road
Brandon, FL 33511
(813) 653-3800

1102 S Florida Ave.
Lakeland, FL 33803
(863) 587-4780

Helpful Resources

Order Death Certificates
1st copy: $5.00 additional copies $4.00
Office of Vital Statistics
P.O. Box 210
1217 Pearl Street
Jacksonville, FL 32231-0042
Tel.(904) 359-6900

Estate Checklist (preliminary)

- ✓ Find and safeguard the Last Will and Testament.
- ✓ Secure property; find care for pets, dispose of perishable items and decedent's prescription drugs.
- ✓ Attend to family grief issues.
- ✓ Accumulate documents, bills and preliminary listing of estate assets and liabilities.
- ✓ Executor consults attorney regarding estate administration & process.
- ✓ Executor / Attorney delivers Will to County Probate Court for appointment (see forms at EstateSettlement.com).

Hillsborough, Clerk of Circuit Court
Probate Division
Room 206 Edgecomb Courthouse
800 E Twiggs Street
Tampa, FL 33602
Monday - Friday (8 AM - 5 PM)
Tel (813) 276-8100

- ✓ Distribute (non probate) jointly held property, beneficiary designated assets (Retirement Accounts, Life Insurance, POD accounts, etc.).
- ✓ Executor contact attorney and files Letters of Administration with probate court.
- ✓ Open creditor claims period.
- ✓ Executor appointed Personal Representative by Court and assumes duties.
- ✓ Get Estate Tax # IRS Form SS4 http://www.irs.gov/
- ✓ Personal Representative to open Estate checking account pay bills & distributes bequests as per Will directives. Be mindful of estate expenses, filing deadlines and taxes.

*** Seek Professional legal advice**

For free additional information visit:
www.EstateSettlement.com