

# INITIAL STEPS TO SETTLE AN ESTATE

This checklist is intended to outline a number of basic steps you can take prior to meeting with an attorney. This checklist is not exhaustive and should not be substituted for proper legal advice from a experienced probate attorney.

- 1  **Funeral Arrangements.** Make funeral arrangements; request certified death certificates from funeral provider.
- 2  **Estate Planning Documents.** Locate the will, codicils, financial POA and any trust documents.
- 3  **Ownership Documentation.** Find deeds, titles, account statements, and an asset list (i.e. real estate, cars, etc.)
- 4  **Social Security.** Notify Social Security Administration and investigate survivor's benefits.
- 5  **Keys.** Locate keys for home, automobiles, safe deposit boxes and post office boxes.
- 6  **Home and Contents.** Secure home and all contents; change locks and arrange for someone to safeguard home during funeral, if necessary.
- 7  **Electronic Data.** Take possession of all electronic devices: computers, cellphones, tablets, etc.
- 8  **Employment Benefits.** Contact decedent's employer regarding unpaid wages and potential death benefits.
- 9  **Pay On Death Assets.** Beneficiaries of "POD" or "TOD" acts can immediately claim.
- 10  **Credit Cards.** Notify credit bureaus; do not pay credit card bills without consulting your estate attorney.
- 11  **Cancellations.** Cancel subscriptions and request appropriate refunds, cancel recurring charges.
- 12  **Insurance Benefits.** Explore benefits including life insurance, accidental death & credit life policies.

We can help you take the next steps.