



Ron and Marianne Smith
DRE 01369041 / 02052091

661-904-5313/5312

Ron@RMSRealEstateTeam.com



Probate Checklist

This is not all inclusive list, but a general list. Each probate is different.

- Secure Any Real Estate (change security codes, locks, etc.)
- Secure all sensitive documents, bank statements, birth certificates, Social Security Documents, etc.
- 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, i.e., Filing without legal counsel)
- Determine Which Level of Probate Is Necessary for The Estate
- File Probate with The County Clerk (form DE-111)
- Caution – do not sell or distribute assets before the court signs “Ordre for Probate” DD-140
- 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. DO NOT FORGET ABOUT PROPERTY TAXES
 - (Speak with a Probate attorney and a real estate professional who is familiar with Probate)**
- Real Property (real estate)
 - Get an appraisal for each property. You will need for taxes/capital gains if any.
 - 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. If you have any questions please contact us.

Start an Inventory of Assets

- Life Insurance –
 - Company name, address, phone number and policy number for each policy
- Investment Account
 - Investment company name, address, phone number and stock number for each investment (it could be stocks, bonds, etc.)
- Checking and Savings Accounts
 - Bank name, branch address, phone number accounts
 - Could be multiple banks and accounts.
- Employer Pay (ex: final paycheck, death benefits, etc.)
- List of Debts
- List of Valuable Personal Property
 - Give a description of each item.
- List of Real Estate Property
 - Address, mortgage(s)
 - If there is a mortgage –
 - Lender name, phone number, account number
- List of all auto payments and try to cancel them.
 - This could be bank auto pay, PayPal, subscriptions.
 - Don't stop paying for the utilities (water, electricity gas trash) especially if decedent has real property and you want to sell it later.

Additional Items

- Notify know creditors and obtain payoff information. Try to have them discontinue the accrument of interest.
- Notify the Social Security Administration and ensure survivors receive benefits (if applicable)
- Obtain prior income tax forms (federal and state) and property tax bills.

Plan for the Closing of Probate

- Finalize an asset distribution plan.
- Pay the estate's 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.