CARLILE PATCHEN & MURPHY LLP
ATTORNEYS AT LAW

Probate Checklist

When a loved one passes, it can feel overwhelming to manage the financial and personal affairs of the deceased while focusing on the grieving process shared with family members and friends. Whether the deceased had a structured estate plan in place, or not, the following checklist of important records/documents to gather along with understanding "who to notify," can assist in making the estate administration process more efficient.

Gathering Documentation

The following is a list of documents that an executor or person applying for fiduciary appointment should obtain as quickly as possible after the death of a loved one in order to assist in the administration of the estate and ultimately, the retitle (transfer) of assets held in the decedent's name to the estate:

	Comments/Questions
• Locate and secure Last Will and Testament	
• Bank account records, including checkbooks and checks	
• Mortgages and deeds to real property (real estate, land)	
• Personal property tax records for the last three years	
• Leases to which the decedent was a party	
• Most recent and prior year-end brokerage statements	
• Any stock or bond certificates registered to the decedent	
• Latest quarterly and year-end statements for any retirement plans or IRAs	
• Insurance policies (life, health, car, rental)	
• Loan documents, including any relating to the decedent's mortgage	
• Federal and state income tax returns for the past three years	

Gathering Documentation (cont.)

• Promissory notes to which decedent was a party	
• Partnership agreements, operating agreements and shareholder agreements to which the decedent was a party.	
• All gift tax returns (Form 709)	
• Latest credit card monthly statements	
• Additional debt – mortgage, child support, etc.	
• Any records relating to the value of tangible assets, such as jewelry, art, etc. (such as appraisals or insurance schedules)	
• Title to a burial plot	
• Titles to automobiles, boats, etc.	
• Titles to other personal property	
• Trust documents	
• Death certificate (see next section)	
• Full names, addresses, Social Security numbers and dates of birth for surviving spouse and decedent's children	
• Divorce decrees, prenuptial agreements	
• Passwords to email accounts, financial accounts	
• Annuity contracts and statements	

Notifying/Contacting Individuals and Institutions

The executor or family member should notify one or more of the following entities, as appropriate, upon the death of a loved one.

- Dept. of Health & Vital Statistics for copies of death certificate (Ohio 614- 466-2531)

  Obtain multiple ***certified*** copies (4) of the death certificate for financial institutions, probate estate administration, Social Security Administration, and other applicable institutions. Your funeral home may (or may not) assist with this process.

- Individual holding the decedent's power of attorney
  Note: Any power of attorney granted by an individual becomes invalid upon the grantor's death.

- Lessor (Landlord)
  If the decedent was leasing property, someone must contact the lessor (landlord) and ask for directions regarding continued use of the property by survivors.

- Service Providers and Memberships
  Contact service providers for any recurring monthly service charges that can be discontinued immediately, such as; cable, internet, newspaper and publication subscriptions. Cancel any health and social memberships w/ monthly fees.

- Social Security Administration (Ohio 800-772-1213)
  If the decedent was receiving Social Security benefits, someone must contact the administration office to end payment of retirement benefits.

- Any company providing a pension or retirement benefits
  If the decedent was receiving pension benefits, someone must contact the appropriate company/entity to end payment of pension benefits.

- Healthcare providers, physicians, eldercare specialists
  Any medical providers, physicians, pharmacies, medical equipment providers, or elder care specialists who may have supported medical needs of the decedent prior to his or her death should be notified.

Contact the experienced Probate Attorneys at Carlile Patchen & Murphy
to assist you with ALL aspects of Probate Administration or Litigation.

The legacy of your loved one will be protected

We have two convenient locations to serve you better:

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