To-Do List to Begin an Estate Administration

- ☐ Take time to grieve your loss. Administrations do NOT have to start immediately.
- ☐ Verify that you are the right person to do this. Are you the surviving spouse? The named Executor/Administrator/Trustee? If not, find out who is.
- ☐ Get a binder, folder, or whatever you can use to corral documents. There will be a lot.
- ☐ Fill out the following information and keep it at the front of your binder:
    - Name of Decedent (Loved One):
    - Date of Birth:
    - Date of Death:
    - Last Permanent Address:
    - County of Last Permanent Address:
    - Last 4 of Social Security Number:
    - Name of Surviving or Pre-Deceased Spouse:
    - If Spouse is Pre-Deceased, Date of Death:
    - Name(s) of Surviving Child(ren):
    - Name(s) of Pre-Deceased Child(ren):
    - Date of Death of Pre-Deceased Child(ren):
- ☐ Start collecting documents, either the originals or copies.
    - Death Certificate (try to get a few)
    - Will
    - Trust (if applicable)
    - Monthly Bank Statements
    - Life Insurance Policy Statement(s)
    - Deed to House(s)
    - Vehicle Registration(s)
- ☐ Find an attorney and schedule a consultation for an Estate and/or Trust Administration
- ☐ List any specific questions or worries you have for your attorney here:

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March, 2019