



## CHECKLIST TO HELP ADMINISTER THE ESTATE OF A FAMILY MEMBER

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- LOCATE** wills, trusts, and any other estate-planning documents.
- LOOK** for instructions of how your loved one wanted to be memorialized and whether he or she prepaid plans, like burial insurance.
- IDENTIFY** executor of the will or trustee of any trusts. This person or entity should obtain letters of administration or letters of testamentary to demonstrate authority to settle the deceased's financial affairs.
- OBTAIN** several copies of the death certificate. It will be requested repeatedly.
- SECURE** personal property to prevent theft or damage.
- KEEP** a list of basic information available to easily answer common questions, such as date of birth and social security number.
- NOTIFY** governmental agencies (Social Security, Veterans Affairs) and employers who may have been making payments prior to death.
- COLLECT** current insurance policies, banking, credit and investment accounts, household bills, and titles to property and vehicles.
- DETERMINE** the titling of accounts, as this will be considered in the disposition of assets in connection with other estate-planning documents.
- ALERT** credit card companies and credit reporting agencies, so no further charges are incurred.
- INVENTORY** household goods and personal belongings to make sure everything is included in the estate and properly distributed.
- CLOSE**, cancel, or transfer accounts, service agreements, subscriptions, and memberships to avoid future expenses.
- SEEK** death and survivor benefits from life insurance carrier(s), Social Security Administration, and Veterans Affairs, as applicable. Other potential sources of benefits include the decedent's pension plan, worker's compensation policy, health insurance, car loans, credit card agreements, and mortgages.
- DETERMINE** if the decedent's employer pays out 401(k) funds, earned and unused vacation time, holiday pay, or bonus compensation.
- PAY** final bills.
- TERMINATE** e-mail and social networking accounts.

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