

**Checklist of Personal Representative
Preliminary Responsibilities**

The death of a loved one is a traumatic experience. You should take care of your and your family's grief at this difficult time. You should not make important decisions while you are in your grieving process. Most estate administration can wait until you are ready. However, if you wish to make sure preliminary steps are addressed when you are able, the following is a checklist of starting tasks you may accomplish prior to consulting with an estate attorney.

Please be aware that this list is meant to be a preliminary list for general purposes, and the specific tasks for the particular estate at hand may be different.

You should be sure to consult with an estate administration attorney to be sure that the estate is managed properly. As the estate's personal representative, you do have fiduciary obligations to the estate. If these duties are not properly fulfilled, you may be subject to liability to the estate and/or beneficiaries.

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CHECKLIST FOR PRELIMINARY ADMINISTRATION **ASSETS**

(Check if complete)

- ___ 1. If not already done by the mortuary company, order at least one (1) **certified death certificate** per asset or account owned by the decedent.
- ___ 2. Locate the **original Will**. Your estate attorney will lodge the original Will with County Court Clerk. Remember, a Will is a public document.
- ___ 3. If not already done by the mortuary, notify the **Social Security Administration** of death (1-800-772-1213).
- ___ 4. If any Medi-Cal benefits were being received, notify the **California Department of Health Services** of death (1-916-657-1460). Notice of death should include a copy of the death certificate, as well as your name, address and phone number (as personal representative of the estate). The notice should also contain my contact information as the attorney for the estate, and the probate case number (given by the court) and the county where probate is occurring. Notification should be mailed to: Department of Health Services, Recovery Section, P. O. Box 997425, MS 4720, Sacramento, CA 95899-7425.
- ___ 5. Arrange for the decedent's mail to be forwarded to your address.
- ___ 6. Safeguard the home and the contents by arrange for locks to be changed on the decedent's home (if necessary) to secure the home contents.
- ___ 7. To protect against identity theft, submit driver's licence along with a letter notifying of death to the **DMV Driver's License Department**, P.O. Box 942890, Sacramento, California 94290-0001. (This step is not absolutely required - you may keep the license if you wish, but I recommend handing over the license to the DMV for identity theft protection.)
- ___ 8. If there is safe deposit box, locate the key and inventory contents and confirm whether it contains the decedent's original estate planning documents.

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CHECKLIST FOR PRELIMINARY ADMINISTRATION

ASSETS

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- ___ 9. **Locate the pink slip to all vehicles.** If you cannot find a pink slip, you may request a duplicate from the DMV. (You may print the request for duplicate title by printing the form at <http://www.dmv.ca.gov/> and submitting it to the DMV.)
- ___ 10. Gather the **monthly statements dated closest to the date of death for the all bank accounts** showing how each account is titled and the value of each account.
- ___ 11. Gather the monthly statements dated closest to the date of death for **all mutual fund and/or brokerage accounts (non-retirement)** showing how each account is titled and the value of each account.
- ___ 12. Gather the monthly statements dated closest to the date of death for **all retirement accounts.**
- ___ 13. For the any life insurance policies, **notify the life insurance custodian of death and request documents to be sent to beneficiaries to submit a claim for the proceeds.**

ESTATE EXPENSES

Estate expenses are all debts incurred prior to death (i.e., medical bills, credit card charges, etc.), all funeral and burial expenses (including memorial expenses such as flowers, catering, copies, etc.), and all other costs necessary to administer the estate (i.e., probate costs, expenses to clean and/or fix up the home for sale, estate tax return preparation fees, individual income tax preparation fees, etc.). .

- ___ 14. Gather documentation regarding **funeral, burial, and last medical expenses and other expenses paid on behalf of the estate.**
- ___ 15. **Keep track of all expenses which you pay out-of-pocket.** This recordkeeping is essential - you are entitled to reimburse yourself for any estate expenses which you paid with your own funds. You should reimburse yourself and create a record for which expenses you are reimbursing yourself.

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ESTATE EXPENSES

(Check if complete)

- ___ 16. **Continue paying the monthly mortgage payments, if any.**
- ___ 17. **If applicable, discontinue cable service, telephone service, cell phone and all other services which are not essential and pay the remaining balance owing on each account.** (Water and electricity service should be continued since those will be needed to sell the home.)
- ___ 18. **Contact each credit card company and notify of death and request a waiver of interest and/or penalties.** Some companies will waive interest and penalties due to death of cardholder. Each credit card company has different policies with regard to cardholder death - some companies will not release any information to you.
- ___ 19. **Gather monthly credit card statements containing all remaining charges on the respective credit cards.**
- ___ 20. **Contact insurance companies (home insurance, car insurance, etc.) and notify regarding death.** You may receive a refund for pro rated premiums.

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