

Probate Process Checklist

| Locate the will, estate plan, life insurance policy or trust

| Determine beneficiaries

| Take an inventory of the deceased's estate:
Financial
Digital
Real Property

| Determine guardian(s)

| Have a conversation with all contributors including:
Beneficiaries
Executors
Trustees
Guardian
Others

| Obtain at least 5 death certificates

| Determine whether an attorney will be necessary

| Determine next of kin

- Made a list of debts
 - Loans (student, car, other)
 - Mortgages (first, second, etc.)
 - Child support
 - Others
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- Rent

- Mortgages

- Insurance

- Utilities

- Final bills to be paid once probate is complete:
 - Taxes
 - Credit card bills
 - Medical bills
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- Cancel:
 - Credit cards
 - Prescriptions
 - Utilities or transfer account to surviving spouse or next of kin
 - Mail
 - Subscriptions



Cancel online accounts such as:

Amazon

PayPal, Square, Dwolla or others

Ebay

Email

Social Media

Entertainment

Others



Divide final personal property not included in the will



Sell final unclaimed property through online platform,
estate sale or donate to charity