Trustee/Personal Representative Checklist

Item	Notes, Comments
1. Obtain burial and funeral service information.	
2. Secure residence and change locks.	
3. Take possession and secure decedent's tangible personal property.	
4. Prepare obituary notice.	
5. Review will/trust and have successor trustee accept appointment.	
6. Prepare date of death asset and debt inventory.	
7. Contact attorney to open probate, if necessary.	
8. Inform beneficiaries of their interests.	
9. Place advertisement of Notice to Creditors.	
10. Complete address change forms.	
11. Notify Social Security and retirement benefits companies.	
12. Obtain TIN (complete SS4).	
13. Obtain certified copies of Death Certificate.	
14. Inventory decedent's safe deposit box.	
15. Open or update estate or trust bank accounts.	
16. Gather all financial asset statements and stock certificates.	
17. Order real property and personal property appraisals.	
18. Prepare insurance and annuity claim forms.	
19. Determine employee benefits and commence retirement plan MRDs.	
20. Notify creditors and determine payment schedule.	
21. Collect debts due the decedent.	
22. Arrange for sale of real property and estate assets.	
23. Cancel subscriptions and remove from mailing lists.	
24. Cancel or deal with social media accounts.	
25. Arrange for continuation of decedent's business.	
26. File tax returns (income, estate).	
27. Prepare final accounting for beneficiaries and obtain approval.	
28. Distribute net estate to beneficiaries.	