

ESTATE CHECKLIST

ESTATE OF _____

DOD _____

Personal Representative: _____

Phone: _____ Alt. Phone: _____

Address: _____

Client's E-Mail Address: _____

Decedent's Social Security No.: _____

EIN: _____ Case No.: _____

To Open an Estate:

E-File:

- | | |
|--|---|
| <input type="checkbox"/> Petition for Administration | <input type="checkbox"/> Oath of PR and Designation |
| <input type="checkbox"/> Notice of Administration | <input type="checkbox"/> Notice of Trust (in duplicate) |
| <input type="checkbox"/> Waiver of Formal Service | |

Mail to Clerk Probate Dept:

- | | |
|---|--|
| <input type="checkbox"/> Original Death Certificate | <input type="checkbox"/> Original Will |
|---|--|

Mail to Judge:

- | | |
|--|--|
| <input type="checkbox"/> Proposed Letters (2 copies) | <input type="checkbox"/> Proposed Order (2 copies) |
| <input type="checkbox"/> Copy of Petition for Admin | <input type="checkbox"/> Copy of Oath of PR |
| <input type="checkbox"/> Copy of Death Certificate | <input type="checkbox"/> Copy of Will (if any) |
| <input type="checkbox"/> Stamped Return Envelope | |

Mail to Recording Dept:

- | | |
|--|--|
| <input type="checkbox"/> Original Death Certificate | <input type="checkbox"/> Affidavit of No FL Estate Tax Due
(DR-312 or DR (313)) |
| <input type="checkbox"/> Affidavit of Continuous Marriage
(If applicable) | <input type="checkbox"/> Check for Recording Fees |
| <input type="checkbox"/> Stamped Return Envelope for Return of the Originals | |

- *Mail Form 56 to IRS.**
- *Mail Unclaimed Property Letter.**

<u>TO DO:</u>	<u>DUE DATE:</u>	<u>CHECK/DATE WHEN DONE:</u>
LOA Issued		_____
Serve NOA Within 30 days after LOA Issued	_____	_____
File Receipts of NOA Promptly		_____
File Proof of Service of NOA Promptly		_____
Apply for Tax ID SS4 & Auth Letter		_____
First Publication Promptly		_____
Serve NOC Promptly after Pub - Certified Mail, Return Receipt *MUST SERVE ON AHCS IF OVER 55!!!**		_____
File Proof of Publication Upon receipt of Affidavit of Publication		_____
Claims Expire 3 Mos. From Pub	_____	
Objections Expire 4 Mos. From Pub	_____	
File Stmt Re: Creditors 4 Mos. From Pub	_____	_____
PR's Proof of Claim 3 Mos. From Pub	_____	_____
Bank/Brokerage Letters Sent Promptly		_____
Original Valuations Done Promptly		_____
Inventory Safe Deposit Box		_____
Estate Checking Account Opened		_____

TO DO:

DUE DATE:

CHECK/DATE WHEN DONE:

Insurance Claims Filed
Form 712 Requested

Inventory
60 Days from LOA

File Proof of Service of Inventory
Promptly after Inventory is filed

HAVE REQUIRED MINIMUM DISTRIBUTIONS BEEN TAKEN????
IF NECESSARY

Estate Tax Return
3 months and 15 days after end of Fiscal year

INFORMAL ESTATE CLOSING:

1. Waiver of Accounting, receipt and consents filed.
2. Order of Discharge Signed.

FORMAL ESTATE CLOSING:

1. Notice of Final Accounting and Petition for Discharge sent to Beneficiaries.
2. Proof of formal service filed.
3. 30 Day Objection Period Expires: _____
4. Report of Distribution and Receipts Filed.
5. Order of Discharge Signed.