St. Louis Family Resources

StLouisFamilyResources.com

ST LOUIS GUIDE TO PROBATE ADMINISTRATION

Checklist by Time Frame & Responsibility

___ Forward decedent's mail	First week	Personal Rep (PR)
___ Notify close friends & family	First week	Personal Rep
___ Notify employer	First week	Personal Rep
___ Secure Any Real Estate & Personal Property	First week	Personal Rep
___ Change Locks (Highly Recommended, things have a way of disappearing)		
___ Check Insurance for Vacant Coverage, add Vacant Rider or Replace Policy		
___ Post No Trespassing Sign, Inform Local Police if Vacant		
___ Secure ALL Personal Property		
___ Notify Veterans Affairs (if applicable)	First week	Personal Rep
___ Arrange funeral	First week	Personal Rep
___ Locate the Will	First week	Legal/PR
___ Order death certificates (Funeral Director Assist)	First week	Legal/PR
___ Retain Probate Attorney (Call for referral)	First month	Legal
___ File Probate with County Clerk, Request Letters	First month	Legal
___ Submit Will to court	First month	Legal
___ Determine Personal Representative comp	First Month	Personal Rep
___ Cancel unneeded services	First month	Personal Rep
___ Notify Social Security	First Month	Personal Rep
___ Submit/Receive Letters Testamentary/Administration	First month	Legal
___ Start ancillary probate (if applicable)	First month	Legal
___ Run Notice to Creditors in Newspaper	First month	Legal/PR
___ Determine heirs	First three months	Legal/PR
___ Notify heirs	First three months	Personal Rep
___ Request Employer Identification Number (EIN)	First three months	Personal Rep
___ Open estate bank account	First three months	Personal Rep
___ Set-up Auto Pay – Mortgage, Utilities, debts	First three months	Personal Rep
___ Establish family allowance	First three months	Personal Rep
___ Notify credit cards	First three months	Personal Rep
___ Notify life insurance companies	First three months	Personal Rep
___ Notify IRAs and similar beneficiaries	First three months	Personal Rep
___ Notify other agencies (DMV, etc.)	First three months	Personal Rep
___ Notify extended acquaintances	First three Months	Personal Rep
___ Consider online media accounts	First three months	Personal Rep

___ File IRS Form 56	First three months	Tax/PR
___ Find and claim assets	First three months	Personal Rep
___ Record first asset	First three months	Personal Rep
___ Search for hidden assets	First three months	Personal Rep
___ Consider loyalty points	First three months	Personal Rep
___ Determine asset values	First three months	Personal Rep
___ Deal with firearms	First three months	Personal Rep
___ Record first debt	First three months	Personal Rep
___ Identify Personal Property for Heir Distribution	First three months	Personal Rep
___ Determine Legality & Timeframe for Sale of Property	First three months	Personal Rep
___ Get estate allocation input from heirs	As possible	Personal Rep
___ Repair & Maintain Real Estate (as Needed)	As possible	Personal Rep
___ Arrange for an Estate Sale of Unwanted Property	As possible	Personal Rep
___ Donate Unwanted Clothing & Belongings	As possible	Personal Rep
___ Clean Out Real Property (Real Estate)	As possible	Personal Rep
___ Arrange for Final Cleaning Of Property	As possible	Personal Rep
___ Sell real estate	As possible	Personal Rep
___ Debt Claims deadline expired (Generally 6 Months)	As possible	Personal Rep
___ All debts recorded	As possible	Personal Rep
___ Determine estate solvency	As possible	Personal Rep
___ All debts resolved	As possible	Personal Rep
___ Begin estate allocation plan	As possible	Personal Rep
___ Asset allocation plan complete	As possible	Personal Rep
___ Provide Schedule K-1 to any trust beneficiaries	Tax Notices	CPA/PR
___ Pay property taxes (installment 1)	Tax year	CPA/PR
___ Pay property taxes (installment 2)	Tax year	CPA/PR
___ Submit final decedent income tax forms (1040)	Tax year	CPA/PR
___ Submit estate income tax forms (1041)	Tax year	CPA/PR
___ Submit trust income tax forms	Tax year	CPA/PR
___ Submit personal liability discharge (5495)	Tax year	CPA/PR
___ Submit estate tax form (706)	First year	CPA/PR
___ Submit federal heir forms (8971)	First year	CPA/PR
___ Request federal estate tax closing letter (627)	Second year	CPA/PR
___ Receive federal estate tax closing letter (627)	Finish	CPA/PR
___ Receive any needed government closing letters	Finish	Personal Rep
___ Make all distributions	Finish	Personal Rep
___ Compensate personal representative	Finish	Personal Rep
___ Submit probate final accounting	Finish	Legal
___ Submit probate closing statement	Finish	Legal
___ Close estate bank account	Finish	Personal Rep
___ File final IRS Form 56	Finish	CPA/PR

Terry Peterson is a Realtor and Certified Probate Expert. Call Terry with questions or support at (314) 918-5151.
For additional resources check out our website at **www.StLouisFamilyResources.com**.
Also on **YouTube @StLouisFamilyResources**, many educational videos, topic specific.
If this Checklist is of value, please consider allowing me to serve your real estate needs. Thank You.