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Personal Representative Checklist

You are named the personal representative and a loved one or family member has just died. No doubt these are difficult times, but thankfully there are many resources for help. The following is a checklist of initial important tasks to help guide you after the funeral or memorial service.

First Priority Action Items

____ 1. Take possession of all legal records including:
- ✓ Original will and all amendments or codicils
- ✓ Tangible Personal Property Memorandum or writing indicating instructions for distribution of tangible personal property (such as jewelry, furniture, cars)

____ 2. Take possession of all financial records such as:
- ✓ Inventory of assets if available
- ✓ Passwords to computer, internet media, or social media
- ✓ Checkbooks / Credit cards / Statements from all banks, financial companies, or financial advisors

____ 3. Take possession of all keys or codes to:
- ✓ House and other real estate or rental properties
- ✓ All vehicles or boats / Storage room
- ✓ Safe or bank safe deposit box

Note: Do not allow entry to Safe Deposit Box without a witness and prior discussion of arrangements probate attorney.

____ 4. Lock and secure all real estate and household contents

____ 5. Engage probate attorney. Unless the estate is small (roughly under $6,000) Florida requires you to engage an attorney

____ 6. Engage CPA or accountant and determine deadlines for filing tax returns

____ 7. Contact decedent's Financial Advisor

____ 8. Order minimum of 10 death certificates (these can usually be obtained through the funeral home) and collect documents on Document Checklist

____ 9. Calendar important dates: such as deadline for filing decedent's final 1040 tax return, estate income tax return, and if applicable, Form 706 estate tax return. Note: As Personal Representative you are liable to the IRS for all estate tax matters.

____ 10. Buy a notebook and keep track of your time and work on behalf of the estate: Note: Few beneficiaries will appreciate the time and extensive work of the Personal Representative unless they have had to perform these duties themselves. To be fully compensated for your time, you likely will need to account for all your time incurred as PR.

Please Note: This list is provided to you as resource for your position as Personal Representative. I am not an attorney and am not offering legal advice. If you don't have a Probate Attorney I would be happy to refer you to one that can assist you.

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Second Priority Action Items

____ 11. Complete Master Information List: This is an inventory of all the decedent's assets and most importantly how they are titled and what, if any, beneficiary designation.

____ 12. Open estate bank account

____ 13. Set up Quicken/Quickbooks or similar accounting program: Note: As Personal Representative you must account for all funds received and all funds paid out. If you are not adept and diligent at accounting, hire a bookkeeper or accountant. Remember as Personal Representative you will need to provide a detailed accounting to all beneficiaries for all probate income and expenses. Some expenses will be tax deductible.

____ 14. Deposit Will with the Clerk of Court Note: Florida law requires that the Will be filed with the Clerk of Court within 10 days of death.

____ 15. Advise Post office to forward mail

____ 16. Cancel utilities, subscriptions

____ 17. Contact homeowner's insurance and keep insurance current

____ 18. If homeowner association, contact and keep payments current

____ 19. Inventory Safe Deposit Box with at least one witness after first consulting with probate attorney.

____ 20. Search records for potential creditors Note: Do not pay creditors until you have ascertained their legal validity and priority. As Personal Representative you have the duty to contest creditor claims