



Real Estate Checklist

1) Police/Security

- Have I notified the police of the empty dwelling?
- Will they heighten their oversight during the funeral and/or memorial service, not just for the home of the deceased, but also close family members?
- Is there a close family member that can live in the dwelling temporarily?
- Have I recorded the security code and contacted the security system provider?

2) Mortgages/Rent

- Have I left the information on either the mortgage company or landlord/lessor?
- Is there mortgage insurance, which will pay of the mortgage at your death?
- Is there storage allocated to my apartment that also will need to be cleared out?

3) Utilities

- Have I left a list of all the utilities that are used in all of my homes?

4) Maintenance/Help

- Is there a list of all of the professionals that help maintain the property and/or provided me with assistance (with contact details)?

5) Clearing the Dwelling

- Is there a list of personal bequests or gifts from my personal property?
- Are there any contributions/gifts of artwork or historically significant objects to museums or historical societies?
- What can I consider gifting to loved ones before my passing?



6) Other Real Property

- Are there either investment property and/or vacation or second homes that are owned?
- Is all of the information regarding these properties recorded as part of my pre-planning process?
- Are any of these homes on leased land? If so, has this also been left with the information on the owner of the property?
- Do I want to give any of these properties to a loved one prior to my death?