JOHNSON LAW PLLC CENTER

Summary Probate Checklist

Immediate Steps

	Notify family and friends
	Find estate planning documents, such as will or trust, if available.
	Search for instructions regarding burial and anatomical gifts, if any
	Arrange for organ donation, if applicable.
	Make funeral arrangements.
	Obtain certified copies of death certificate in both short form and long form
	Coordinate care for dependents and pets
	Notify Social Security Administration and pension administrators of death.
	Coordinate with family members to notify others of the passing.
	File original will in the probate court in the county of the decedent's domicile.

First Notifications

	Notify banks, credit unions, credit card companies of the death. This is important to stop automatic drafts/withdrawals and shut doe the accounts. It is unlawful to make withdraws once a person has died. You may fax or hand deliver short form death certificates. The place will make a copy.
	Notify Life Insurance company of death. They will likely require a long form death certificate.
	Send copies of the death certificate to the three major credit reporting agencies: Equifax, Experian, and TransUnion.
	Notify Veterans Affairs if the decedent was a veteran or if the decedent was receiving VA benefits from a pre-deceased veteran.
	Look through mail and identify creditors to help you take appropriate actions. Stop subscriptions.
	Stop all unnecessary expenses: subscriptions (magazine, newspaper), health care (home care), memberships (gym, club, sports, auto, professional, etc), entertainment (cable, satellite,

	websites), communication (telephone, cell phone, Internet).
	Cancel credit and debit cards – notify all holders of assets: banks, broker, insurer

Prepare for Probate and Secure Assets

	Secure the home, contents of the home, other real estate, and assets until probate completes.
	Check on the property taxes for the county the decedent lived in, as this is very important to avoid loss of property.
	Find and secure keys to any vehicles. Do NOT allow vehicles to be driven by anyone. If an accident occurs, the estate risks liability. Make a decision on whether you are keeping a vehicle with a car loan or arrange pick up of vehicle with lender.
	Notify all service providers: utility companies, landlord, property maintenance, alarm.
	Manage "digital assets" (like online accounts, photos and documents stored on line, etc.).
	Secure personal property, business, vehicle, perishable goods, safety deposit box.

	Obtain names, emails, and addresses of individuals named in will (all of them). If no will, obtain names, emails. And addresses of those closely related to deceased.
	Find a probate attorney and book a consultation. Gather all important documents such as asset-related documents: deeds, property insurance, mortgage, lease, business, investment, etc.
	Find and upload all financial obligations: contracts, divorce or separation agreement, court orders.
	Bring original will to probate meeting unless already filed in the probate court in the county of the decedent's domicile.
	Log into Client portal, sign existing contracts, pay probate fees, complete probate questionnaire and upload documents.
	Advise beneficiary/ies as to status of estate
	Contact the existing homeowners insurance. The company may terminate coverage because the policy is in the deceased individual’s name. It is recommended that you obtain short-term insurance until the title has been

	transferred to the new beneficiary/ies. This will protect your assets from fire, and other hazards set forth in the policy. Check in with the homeowner insurance company as soon as possible, and anytime the title changes owners, secure a homeowner's insurance policy under the new owner(s) name(s). This is extremely important. Sometimes homeowners insurance is paid as part of an escrow account with the mortgage, so be sure to check accordingly.
	Advise the beneficiaries as to the status of the estate. Summary Probates take up to 8 weeks.
	Check www.FLTreasureHunt.gov for any unclaimed property in decedent's name.
	Determine whether beneficiaries can amicably divide the contents of the household. Make a written inventory of personal property inside of the home, where applicable, and estimate the value of the documents. Each beneficiary receives a value equal to his/her share. It is best to have a writing to this effect (i.e. screenshots of texts since texts can be edited, email, letter, etc.).

This is NOT an exhaustive list. You may have other duties not listed here.