FOR YOUR CONVENIENCE FROM THE LAW OFFICES OF

Brian R. Dolan, LLC

PRELIMINARY POST-FUNERAL PLANNING CHECKLIST*

Items to Find and Secure: The Last Will and Testament and/or Trust Documents; keys to safe deposit box; life insurance policies; business/partnership agreements; decedent's checkbook, ATM card, credit cards & address book; bank account statements; marriage certificate; veterans records; retirement plans and employment records; tax returns. Important & valuable family keepsakes. Other important documents. (Circle those that apply) Notes:

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Items to Accumulate: Current monthly bills; medical bills; bank statements; checks received in the name of the decedent. Keep receipts for funeral expenses and any "out of pocket" estate expenses. Executor, accumulate list of assets and liabilities and debts. Note due dates on bills. Note the legal title descriptions on all accounts, assets and debts. Take pictures of home for quick inventory of contents (if no surviving spouse). Notes:

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Contact: Family and Friends that could not be reached for funeral. Contact minister, priest or other support resource. Contact: Accountant, Social Security Administration, Veterans Administration, insurance companies (regarding life, health, property insurance & annuities). Contact Estate Attorney (Florida probate law requires an Attorney in most cases). Notes:

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Family Care Issues: Be mindful of family member bereavement issues and healthcare. Maintain security of home and property. Note family "issues" or disputes. Spouse may use joint account to pay bills, but others should not use decedent's checkbook, credit cards, ATM card, or auto. Consider a memorial or donation that the family, beneficiaries and Personal Representative believe to be a fitting remembrance. Notes:

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Starting the Probate Process and Responsibilities: Executor or Estate Attorney to deliver Last Will & Testament to probate court. Getting the Will to the probate court will allow the Personal Representative (upon appointment) to pay bills. Probate assets (assets held in decedent's name) or personal property items should not be distributed to beneficiaries without court approval. Decedent's assets should not be used to pay pre-death bills, debts, or creditors without first checking with Estate Attorney. Executor, Personal Representative (or Attorney) should maintain possession & control of property and all important records and documents. Notes:

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***Seek advice from an Estate Administration Attorney before taking any action.**

Law Offices of Brian R. Dolan, LLC
Probate, Estate & Trust Administration and Planning Services

5 Revere Drive, Suite 200
Northbrook, Illinois 60062
Email: brian@dolanlawyer.com

Telephone: (847) 235-6676
Facsimile: (877) 446-2644

Helpful Resources

Obtaining Death Certificates

Illinois
dph.illinois.gov/topics-services/birth-death-other-records/death-records

Florida
www.floridahealth.gov/certificates/death/index.html

County-specific information is available at above state websites.

County Clerks

Lake County
www.lakecountycircuitclerk.org

Cook County
www.cookcontclerkofcourt.org

Broward County
www.browadclerk.org

Estate Checklist (preliminary)*

- Find and safeguard the Last Will and Testament.
- Secure property; find/care for pets, dispose of perishable items and decedent's prescription meds.
- Attend to family grief issues.
- Accumulate documents, bills and preliminary listing of estate assets and liabilities.
- Executor consults attorney regarding estate administration.
- Executor/Attorney delivers Will to County Probate Court
- Distribute non-probate assets (jointly-held property, beneficiary designated assets, retirement accounts, life insurance, etc.).
- Executor contact attorney and file petition to commence probate.
- Executor/ Personal Representative appointed by Court and assumes duties.
- Get Estate Tax # & IRS Form SS4 http://www.irs.gov/
- Personal Representative to open estate checking account. pay bills & distribute bequests as per Will or other directives. Be mindful of estate expenses, filing deadlines and taxes.

*** Seek professional legal advice**

For additional information contact:
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