



Voice/Text:
(404) 980-3135

Fax:
(855) 240-2540

Office Location:
1350 Scenic Hwy North
Suite 266
Snellville, GA
30087

Mailing Address/ Payments:
P.O. Box 522
Stone Mountain, Georgia
30086

Email:
jb@JBLaw.biz

Website:
www.JBLaw.biz

PERSONAL REPRESENTATIVE (PR) CHECKLIST

For Estate of ("Decedent"): _____

Grief is an individual process that does not move according to a Court calendar or any particular schedule. So while it hurts when we have lost a loved one, and realistically we can only mourn for so long before having to get back to working our jobs or living our lives, we must give ourselves permission to grieve when we need to grieve. We must also give ourselves permission to ask for help when we are inundated with the multitude of things that need to be handled. Even the simplest of tasks can seem difficult when we are grieving. But don't be afraid to ask for help - help from family and friends for the everyday tasks (such as grocery shopping, meal preparation, or household chores). You may be surprised at the positive response from people wanting to jump in and take some of the load off of your shoulders...if you would just ask.

This PR Checklist was designed to help you as well because there is a LOT involved with being a Personal Representative, whether our loved one left a Last Will and Testament or not. Please note, however, that this Checklist is not meant to be an all-inclusive directive since every case, every individual, every family, is unique. Instead, it is designed to be a guide or at least a starting point to help you navigate the many tasks and responsibilities involved with being a Personal Representative and acting on your loved one's behalf.

These tasks may seem overwhelming at first (yes, there IS a lot to do!). But some of these items may not even apply in your case. And for those that do apply, don't be afraid to ask for help here either. I have highlighted those tasks that **JBLaw** can specifically assist with (using red asterisks *), and keep in mind that **JBLaw** is always available to answer any questions along the way.

Here to serve you,

JB Hilliard, Esq.
The Law Office of JB Hilliard, LLC

PERSONAL REPRESENTATIVE (PR) CHECKLIST

Date filed with Probate Court: _____

Docket (Estate) Number: _____

Date Letters Testamentary or Letters of Administration Issued to PR: _____

WHAT TO DO IMMEDIATELY

TASK	ADDITIONAL INFO / NOTES	DATE COMPLETED
1) Arrange for the immediate care and security of Decedent's minor children or other family members who were under Decedent's guardianship		
2) Arrange for care of pets, plants, and perishable possessions		
3) Arrange for the security of Decedent's home and personal possessions within		
4) Locate Decedent's important documents	EX: birth certificate, marriage license, divorce decree, social security card, driver's license, tax forms, insurance policies, citizenship papers, military discharge, deeds, etc.	
5) Contact funeral home or clergy	<ul style="list-style-type: none"> ▪ Make arrangements if not already done ▪ Will usually order Death Certificate(s) for you & notify Social Security Admin (if applicable) 	
6) Obtain certified copies of Death Certificate	<ul style="list-style-type: none"> ▪ Get at least 5-10 copies ▪ Need one to file with Probate Court 	
7) Obtain copy of Will	<ul style="list-style-type: none"> ▪ Need to file original with Probate Court ▪ Make sure it is the most current version 	
8) * Determine if Estate needs to go through formal Probate process		
9) * File Petition with Probate Court	Petition to Probate Will (& Letters Testamentary) or Petition for Letters of Administration (if no Will)	

PERSONAL REPRESENTATIVE (PR) CHECKLIST

TASK	ADDITIONAL INFO / NOTES	DATE COMPLETED
10) Contact Life Insurance company	If life insurance proceeds will be used to pay for final expenses, funeral home will usually contact them	
11) Apply for SSA and/or VA death benefits (if applicable)		
12) Contact Decedent's employer	Particularly for any outstanding wages, pension or other survivor benefits	

OTHER IMMEDIATE MATTERS

TASK	ADDITIONAL INFO / NOTES	DATE COMPLETED
13) * Apply for federal tax identification number (FEIN) for the Estate	<ul style="list-style-type: none"> ▪ IRS.gov ▪ Estate name: _____ _____ 	
14) Establish bank account for the Estate	All expenses, claims, debts, etc. should be paid by the "Estate," not by you personally	
15) Consolidate Decedent's existing cash accounts into the Estate account		
16) Notify organizations with open accounts in Decedent's name (e.g. utilities, cell phone, credit cards, bank accounts, etc.)	<ul style="list-style-type: none"> ▪ Helps prevent fraud ▪ Some may ask for Letters (see #9 above) 	
17) Notify post office and utility companies if Decedent's home is no longer occupied	EX: cable, Internet, gas, electric, water, lawn care, alarm service, etc.	
18) Notify landlord if Decedent was renting or leasing home		

PERSONAL REPRESENTATIVE (PR) CHECKLIST

TASK	ADDITIONAL INFO / NOTES	DATE COMPLETED
19) Other notifications	<ul style="list-style-type: none"> ▪ Doctors / clinics ▪ Pharmacies (esp if auto-refill set up) ▪ Banks where Decedent used automatic bill-pay ▪ Subscription services (magazines, newspapers) ▪ Decedent's church / religious organization ▪ Other organizations where Decedent was a member ▪ Lawyer / financial advisor / insurance agents / other professional services contacts 	
20) Inventory and collect Decedent's assets	<ul style="list-style-type: none"> ▪ May need to show Letters (see #9) for some asset collection ▪ Obtain copy of deeds for all real property Decedent owned, particularly if out-of-state property 	
21) * Mail copy of Inventory to each heir or beneficiary		
22) Settle all email and online accounts	Use Letters (see #9) to obtain passwords, if necessary	

PERSONAL REPRESENTATIVE (PR) CHECKLIST

MATTERS REGARDING CLAIMS & DISTRIBUTIONS

TASK	ADDITIONAL INFO / NOTES	DATE COMPLETED
23) Continue to diligently check Decedent's mail and notify senders of death	Helps prevent fraud and helps to ensure notifications to all pertinent parties	
24) *Serve notice of Decedent's death on creditors and heirs so that they may file claims on the Estate	Notice is published when you file the Petition with the Probate Court (see #9)	
25) Investigate claims made on Estate to determine validity		
26) *Transfer title of assets to name of Estate		
27) *Complete an interim accounting to determine the value of the Estate and to know if there are funds to pay debts and expenses	Need to determine priority of debts	
28) After all claims are received, pay Decedent's continuing bills and get releases verifying payments	These should be paid from Estate's account	
29) Liquidate assets (if necessary) to satisfy claims on Estate		
30) Make final distribution(s) to heirs or beneficiaries (with Court's permission)	This is AFTER creditor claims and taxes have been satisfied/paid	

PERSONAL REPRESENTATIVE (PR) CHECKLIST

OTHER FINANCIAL MATTERS

TASK	ADDITIONAL INFO / NOTES	DATE COMPLETED
31) Make a list of all Decedent's bills and debts	Include creditor names and addresses	
32) Arrange to open safe deposit box, if not already done	May need Letters (see #9) for authorization	
33) Make a list of the funeral/memorial service expenses as well as expenses from Decedent's last illness (if that was the cause of death or generally within last 6 months)	Keep copies of all receipts, invoices, etc.	
34) Keep a list of all expenses incurred as part of your work as a PR – all expenses incurred in administering the estate	<ul style="list-style-type: none"> ▪ Includes attorney and court filing fees ▪ Keep copies of all receipts, invoices, etc. 	
35) Consider other applicable government benefits and notify the appropriate agencies	EX: Civil Service, state survivor, Public Safety Officers, Federal Employee, Dept of Defense, etc.	
36) Get a copy of Decedent's credit report(s) to check for unauthorized activity & to verify existing creditors	Free reports from all three credit bureaus at www.annualcreditreport.com (need SSN and previous addresses)	
37) *File Estate tax return(s), if required		
38) *Mail copy of Annual Return to each heir or beneficiary (each year Probate is open)		
39) *File Decedent's last <u>individual income</u> tax return (for year of death) and pay taxes (if applicable)	Need to also file for any PRIOR year returns still due	
40) *File <u>Estate income</u> tax returns for each year Estate remains open		

PERSONAL REPRESENTATIVE (PR) CHECKLIST

IF DECEDENT OWNED A BUSINESS

TASK	ADDITIONAL INFO / NOTES	DATE COMPLETED
41) Review business affairs	Obtain copies of business documents (e.g., partnership agreement, meeting minutes, operating agreement, by-laws, etc.)	
42) Notify business partners (if applicable)		
43) Notify customers/clients		
44) Notify vendors		
45) Determine if receivables or payables are still outstanding		
46) * Determine proper close-out procedures, depending upon business structure		

ONGOING TASKS

TASK	ADDITIONAL INFO / NOTES	DATES COMPLETED
47) *Keep record of all payments, deposits, and distributions of the Estate; file with the Probate Court if Accounting is required		
48) *File Annual Return with Probate Court	Filed each year (as necessary) within 60 days of anniversary	

PERSONAL REPRESENTATIVE (PR) CHECKLIST

CLOSING THE ESTATE

TASK	ADDITIONAL INFO / NOTES	DATE COMPLETED
49) *File receipts, tax return copies, and other required reports with the Probate Court and wrap up any closing details of the Estate		
50) *File Petition for Discharge (with Final Return if required)		

PERSONAL REPRESENTATIVE (PR) CHECKLIST

OTHER ACTIONS / TASKS TO COMPLETE:

TASK	ADDITIONAL INFO / NOTES	DATE COMPLETED
51)		
52)		
53)		
54)		
55)		
56)		
57)		
58)		
59)		
60)		

PERSONAL REPRESENTATIVE (PR) CHECKLIST

PREVENTING IDENTITY THEFT

Unfortunately, if we're not careful, it becomes easy for thieves to prey on the unsuspecting and vulnerable and steal the Decedent's personal or sensitive information. To help minimize or prevent that, here are a few suggestions.

TASK	ADDITIONAL INFO / NOTES
Be careful with sensitive information	<u>Shred</u> any important documents, credit cards, ID cards, etc. that are no longer needed (don't just throw away or recycle)
Include minimal information in the newspaper or online obituary	Giving out too much information, including DOB, can make it easier for thieves to impersonate the Decedent
Keep mail safe	If Decedent's home is unoccupied, put a Hold on the mail at his/her local post office or check the mailbox and retrieve the mail every day
Check Decedent's credit report	Check for unauthorized activity
Notify creditors, credit bureaus, and Social Security Administration of Decedent's date of death	Instruct credit bureaus to list accounts as "Closed. Account Holder is Deceased."
Properly dispose of Decedent's computer	Don't just delete files, but <u>destroy</u> the existing hard drive (since that is never fully erased) and replace with a new one, even if computer is a gift to a beneficiary
Be careful online	Try to restrict how much of Decedent's info is given online or via email; don't fall for scams and schemes