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## Personal Representative Checklist

### *First Priority Action Items*

\_\_\_ 1. Take possession of all legal records.

- Original will and all amendments or codicils

\_\_\_ 2. Take possession of all financial records and account information 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
- Mortgage and homeowners insurance information if applicable
- Life insurance policies if applicable
- Social Security cards and other forms of identification.

\_\_\_ 3. Take possession and inventory high value personal items:

- Jewelry, antiques, firearms, petty cash
- House keys and other real estate or rental properties key's.
- All vehicles, boats, motorcycles, storage units including keys and title
- 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

- It may be wise to change all of the locks on the decedent's personal home

\_\_\_ 5. Engage probate attorney to file the proper court paperwork

\_\_\_ 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)

\_\_\_ 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



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\_\_\_\_ 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.

### ***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 if applicable

\_\_\_\_ 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 to personal representative address

\_\_\_\_ 16. Contact utility companies to keep payments current

- Electric
- Water
- Gas

\_\_\_\_ 17. Cancel miscellaneous subscriptions

- Internet
- Cable TV
- Newspaper / Magazines

\_\_\_\_ 18. Contact homeowner's insurance and keep payments current

\_\_\_\_ 19. If homeowner association, contact and keep payments current

\_\_\_\_ 20. Coordinate who will maintain the lawn, pool, etc

\_\_\_\_ 21. Inventory Safe Deposit Box with at least one witness after first consulting with probate attorney.

\_\_\_\_ 22. 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



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Note: This list is provided as a resource to the Personal Representative. I'm not a attorney and this resource should not be considered legal advice.