

CHECKLIST-UPON DEATH OF FAMILY MEMBER

1. **Funeral Arrangements.** Find out what the decedent's wishes were regarding their funeral or memorial service. If there were no instructions, heirs in the following order of priority have the right to arrange: spouse, children, siblings. Funeral expenses are to be paid generally from the decedent's estate.
2. **Death Certificates.** The legal pronouncement of death will need to be provided to numerous entities and is normally obtained through the funeral home. Obtain multiple certified copies.
3. **Locate Important Documents.** Locate and review all important documents as soon as possible, to determine the following:
 - Funeral and burial plans
 - Existence of estate planning documents such as a will or trust
 - Safe Deposit arrangements
 - Insurance policies (life, auto and homeowner's)
 - Pension/retirement benefits
 - Credit Cards (determine balances)
 - Bank Statements (Checking and savings accounts)
 - Titles to motor vehicles
 - Deeds to real estate
 - Stocks and bonds (Investment Statements)
4. **Secure Property.** Notify homeowner's if real estate is now vacant.
5. **Survivor Benefits.** Determine existence and if so, apply.
6. **Closed Membership and Subscriptions.**
7. **Notify necessary governmental agencies and other third parties.** (i.e. social security, post office, utility companies, creditors and employers)

8. Determine outstanding debts.

9. List Inventory.

10. Consult with an Attorney and other professionals to receive specific advice and assistance.

General Probate Information:

Estates Requiring Probate Administration:

If family member owned real estate titled solely in his or her name, probate administration may be required. If the family member owns other non-real estate property in his or her name only exceeding \$100,000.00 in value or where there are numerous claims and debts, probate administration will be required.

Estates Which Do Not Require Probate:

If family member designated beneficiaries by Trust Declaration; payable on death accounts (POD designations); or joint tenancy ownership, and no assets are owned exclusively by decedent then a probate estate may not have to be opened. Small Estate Affidavits may be used to distribute solely owned property of a decedent if, in total, the property is worth less than \$100,000.00.

For additional information regarding probate matters and assistance, please contact Fuqua Winter Ltd. to schedule a free consultation at 847-244-0770 or email at bwinter@fuquawinter.com

This information has been prepared by Fuqua Winter Ltd. to provide general information and is not intended as legal advice.