Fresno Appraisal

Appendix

Executor Checklist Immediate tasks:

- Q Find the Will
- Apply for an Employer Identification Number (EIN) from the IRS
- Q Appraise assets, if needed
- Q Arrange to publish a "notice of probate" in local newspapers
- Determine whether probate proceedings are needed
- Q Protect/manage assets until turned over to beneficiaries
- Collect money owed to the estate (e.g., wages, insurance benefits, rents, etc.)
- Q Pay bills
- File final income tax returns for deceased
- Q File estate taxes, if necessary
- Q Notify inheritors and beneficiaries
- Q Distribute assets

Executor Checklist

Typical Businesses and Agencies to Notify

- Q Banks
- Q Credit Card companies
- Q Utility Companies
- Q Post Office
- Doctors or other health care providers
- Q Employer and Former employers
- Q Investment Firms
- Q Insurance companies
- Q Landlord or Tenants
- Pension payers
- Q Service providers (e.g., landscapers, trash haulers, etc.)
- Q Social Security Administration
- State health/welfare departments
- Q Veteran affairs department

Documents Needed

- Q Bank Statements
- Birth Certificates (both deceased and minor children)
- Brokerage account statements
- Business co-ownership agreements
- Q Checkbooks
- Q Child support documents
- Q Credit card statements
- Disability-related documents
- Q Divorce papers
- Health insurance policies, statements, or bills
- Immigration and citizenship documents
- Q Investment records
- Life Insurance policies and premium payment records

- Marriage license
- Q Military service records
- Q Pension records
- Q Prenuptial agreement
- Real estate deeds and tax records
- Registration papers for vehicles or boats
- Q Retirement account statements
- Q Social Security records
- Q W-2 form showing wages for the current year
- Q Workers' compensation paperwork

Sample Notification Letter

Re: John Doe, deceased Date of death: month xx, 20xx

Age at death: xx

Last address: address, city, state, zip

Enclosed please find the death certificate and copy of the last statement for Mr. John Doe. Please transfer the account to "The Estate of John Doe" (EIN # 22-123456) Payment will follow (or has already been sent) according to your regular billing cycle.

Sincerely,

Jane Doe

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