

- Search for a will, make sure it is valid/current.
- Notify organizations with open accounts in the Deceased's name of the death to help prevent fraud. Remember: cell phone, utilities, credit cards, checking accounts, etc.
- Inventory the Deceased's assets. Identify and notify heirs and interested parties to help understand the estate.
- Contact the Deceased's county probate court or an estate attorney to determine what proceeding (probate, small estate, etc.) is necessary.
- Make sure you are formally recognized as the personal representative by the court. Once appointed, obtain several copies of the death certificate.
- Collect the assets.
- Serve notice of the death on creditors and heirs so they may file claims on the estate. Publish a notice in a newspaper of general circulation.
- Investigate claims made on the estate to determine validity. Liquidate and transfer title of assets.
- Complete an interim accounting to know the value of the estate and to know if there are funds to pay debts and expenses.
- After all claims are received, pay the Deceased's continuing bills and get releases verifying payments. Pay outstanding debts and valid claims on the estate (get releases).
- Make a record of all payments, deposits, and distributions of the estate and file it with the court if necessary (called an accounting). Serve it on interested parties.
- File the Deceased's last tax return and pay taxes. File receipts with the court and wrap up any closing details of the estate.
- If no objections are raised or sustained, distribute the rest of the estate based on the order of priority in the Deceased's state's probate code and/or the will.