



CENTRAL JERSEY
ESTATE SOLUTIONS

PROBATE CHECKLIST

- ☐ Secure Any Real Estate
 - ☐ Post No Trespassing Notice (If real estate is vacant)
 - ☐ Obtain Vacant Property Insurance Rider (If real estate is vacant)
 - ☐ Make Sure Real Estate & Personal Property Is Rekeyed & Secure
- ☐ Obtain The Death Certificate
- ☐ Get A Copy Of The Will (if applicable)
- ☐ Notify Life Insurance Company(ies) of The Death
- ☐ Decide On Attorney Representation
- ☐ Determine Which Level of Probate Is Necessary For The Estate
- ☐ File Probate With The County Clerk
- ☐ Run A Notice To Creditors In Newspaper
- ☐ Set Up A Bank Account For The Estate
- ☐ Set Up Auto-Pay Mortgages, Utilities & Similar Bills Paid Through Disposition
- ☐ Determine Legality & Time-frame For Selling Real & Personal Property
(speak with a Probate attorney and a real estate professional who is familiar with Probate)
- ☐ Clean Out Any Real Property
 - ☐ Have Any & All Real Property (real estate) Repaired & Maintained
 - ☐ Lawn & Landscape Maintenance
 - ☐ Gutter Cleaning
 - ☐ Painting & Exterior Trim Repair
 - ☐ Mechanical Servicing Such As HVAC, Water Heaters, & Appliances
 - ☐ Interior Repairs & Maintenance Such As Plumbing, Electrical, Condition Upgrades, etc.
- ☐ Identify & Divide Personal Property That Heirs Will Keep
- ☐ Arrange For An Estate Sale of Any Valuable Property That The Heirs Don't Want
- ☐ Donate clothing & belongings that the heirs don't want to sell or keep
- ☐ Schedule Cleanout Company To Dispose of All Non-Valuable Items That The Heirs Don't Want
- ☐ Arrange For A Final Cleaning of The Property(ies)

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We'll walk you through the entire process
YOU'RE NEVER ALONE!

PROBATE CHECKLIST

- ☐ Sell Or Rent Any Real Estate Desired
- ☐ Start An Inventory of Assets
 - ☐ Life Insurance _____
 - ☐ Investment Accounts _____
 - ☐ Checking & Savings Accounts _____
 - ☐ Employer Pay _____
 - ☐ Debts _____
 - ☐ Valuable Personal Property _____
 - ☐ Real Estate (Equity) _____
 - ☐ Real Estate (Mortgages) _____
 - ☐ Other: _____
- ☐ Notify Known Creditors & Obtain Payoff Information — Have Them Discontinue The Accruelement of Interest
- ☐ Notify The Social Security Administration & Ensure Survivors Receive Benefits (If applicable)
- ☐ Finalize an asset distribution plan
 - ☐ Pay the estates final debts
 - ☐ Dispose of assets not going directly to heirs
 - ☐ Ensure the final distribution of assets to heirs in the will or according to state intestacy laws
- ☐ Pay the estates taxes
- ☐ Close the estate
 - ☐ Close the estate bank account after all debts are settled and money is distributed
- ☐ File a final accounting with the probate court and ask for the estate to be closed

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