

Probate Checklist

This checklist is a small example of the resources you will receive as a Personal Representative working with JT - receive a field guide with step by step process



Before hiring an attorney to assist you in probate:

You should:

- Allow yourself the time to plan a funeral and be with family
- Determine if there is a Will
- If there is no will found, discuss with family who should be the person to act on behalf of the estate as the personal representative.
- Gather important financial documents such as the most recent bank statements and investment statements
- Gather any evidence of debt
- Gather any documents regarding the homestead or other real property
- Gather monthly bills

You should not:

- Continue to use a Power of Attorney, if you were so-named; a Power of Attorney ends at death
- Give away any personal property, even if it's in the Will
- Transfer title on any vehicles
- Place real property on the market for sale
- Pay any bills and debts. We first must determine whether the estate has enough assets to pay them in full