VEHICLE & DRIVERS LICENSE

CATEGORY	compete date	TASK 12/10/2011
DIRECTIVES, WILLS, TRUSTS and		Review all for compliance
POWER OF ATTORNEYS		Treview all for compliance
MORTUARY		Determine disposition based on AMD and discussions (cremation/ashes at sea in SD, etc.)
		Register with fixed price association Select Mortuary; call and confirm fixed price
		Tell hospital name, address and phone of mortuary
		Provide Advance Directive/DPOA to mortuary
		Mortuary; sign papers; order death certificates; pay bill
		Obtain final notice of cremation and delivery of ashes
MEMORIAL SERVICE	Т	Coordinate with church/Temple/Facility: date, time, sequence of events.
WEWORIAL SERVICE		Post service gathering: set location and refreshments.
		Eulogy - write and ask for reviewers
		Select speakers
	1	Retain musicians
		Select music
		Decide on flowers vs. a charitable donation
		Prepare and print Eulogy/memorial document
		Purchase refreshments
		Flowers
		Pictures select and create display
	<u> </u>	Day of service: set up refreshments, pictures, flowers.
DEATH CERTIFICATES		Order at mortuary above
DE (TO CE (SIL TO C) E O		Obtain Death Certificates
FINANCES hopefully DPOA on accts		Balance Check book
See also TAXES category		Pay due bills (possible exception: Automobile insurance)
		Stop auto-pay from checking account(s) Obtain credits from auto-pay charges to credit cards and checking accounts after death.
		401K's and anunities
		Stocks, Bands
		Time payment materials
		Investment Banker(s): confirm values at date of death (either periodic statements or special letter
	-	Investment Banker(s): Change of Ownership/Registration, Liquidate or transfer
		Investment Banker(s): Certification of Trustee Investment Banker(s): Letter of Instruction with Medallion Signature Guarantee
		old IRAs: close and distribute per beneficiaries list at bank
		New Checking Account for Trust: create after getting new TIN (see TAXES)
		New Savings Account for Trust: create after getting new TIN (see TAXES)
		Old Checking account: close and put money in New (after all automatic payments are completed)
		Old Savings acct: close and put money in New Trust Checking acct
		Cancel Old credit cards and ATM cards Notify old bank of new address to send any 1099's etc.
	_ ·	Prepare list of creditors (may need obtain a credit reports) including balance due, address &
		phone.
INSURANCE		Medical: Review all medical bills for accuracy
Health, Life, Property, and		Medical: Make certain that all bills are sent to insurance companies for payment
, ,		Medical: Pay copays, after payments are made by insurance companies and new statements are
Long Term Care (LTC)		issued by companies
		Medical: After all payments are made, send cancellations to all medical insurance companies
		Life: Insurance companies, find policies and submit claim for death benefit Life: Insurance companies, receive death benefit and deposit with trust
		Life: Employer(s), find policies and submit claim for death benefit
		Life: Employer(s), receive death benefit and deposit with trust
		Life: Union(s), find policies and submit claim for death benefit
		Life: Union(s) companies, receive death benefit and deposit with trust
		If Surviving Spouse, notify of change of beneficiaries on Life Insurance
		Vehicle insurance If going to sell vehicle, wait for until sale is registered at DMV. Then contact Insurance to cancel, copy for records.
		Vehicle insurance Obtain refunds if any.
		Property insurance: maintain until property is distributed, and/or sold. (See REAL ESTATE)
		Property insurance: cancel after property is distributed, and/or sold. (See REAL ESTATE)
		LTC: Create and mail final bills to LTC
		LTC: Receive and reconcile payments
		LTC: Pay Care givers if balance due is not handled by LTC
		LTC: Notify LTC agency of death

Notify DMV to cancel Drivers License



POST-DEATH TASKS CHECK LIST	12/10/20
	Locate Certificate of Ownership "Pink Slip" Values from Kelly Blue Book for both "Private Party" and "Suggested Retail"
	Sell or give vehicle
	Sign over Certificate of Ownership to new owner
	DMV's Notice of tranfer/Release of Liability: fill in, copy for records, mail to DMV.
	Obtain confirmation that transfer was recorded by DMV
NCOME SOURCES	Social Security - cal and confirm they got notice from mortuary 800-772-1213
	Social Security - Confirm any overpayment has been electronically retreived
	Military Retirement - call and ask for forms 800-321-1080
	Military Retirement - return forms with copy of death certificate
	Military Retirement - Confirm any overpayment has been retreived
	Other #1 - call & notify and ask for forms
	Other #1 - obtain & return forms with death certificate
	Other #1 - if required, return whole check for month sent after death
	Other #1 - obtain and deposit new check for part of month
	Other #1 - obtain Death Benefit
	Other #2 - call & notify and ask for forms
	Other #2 - return forms with death certificate
	Other #2 - obtain Death Benefit
	Other #2 - confirm any overpayment has been returned
	Inquire on CA State Controller's Office website for Unclaimed Property (18)
	Inquire with S.D. County Treasurer's Office re any Unclaimed Property, if decedent did business
	in the County. (18)
	If Med-Cal - notify Ca Dept of Health Services Med-Cal Recovery Section
TAVEO	List Dan Science Abrilland Address Add
TAXES	List Beneficiaries, their age, address, telephone number, and SSN; give copy to Estate Rep.
f an employer (of caregiver, etc)	If any collectibles: obtain appraiser's letter on date of death value of personal property
	If Employer State Q1 (EDD DE6) - online
	Employer State Q2 (EDD DE6) - online
	Employer State Q3 (EDD DE6) - online
	Employer State Q4 (EDD DE6) - online (includes notice of (Going Out of Business") Employer State Annual (EDD DE 3 HW) OR Employer Payment Deposit coupon (DE88) +
	Employer State Annual Reconciliation Statement (EDD DE7)
	Employer State Aminda Neconomication State Them (ESS SET)
	Fed. Annual W-3 to Social Security Admin
	Fed. Annual W-2 Wage & Tax Statement to employees
	If Trust, Submit IRS SS: get new Taxpayer Id Number (TIN); includes set Fiscal Year (to Sept 3
	If estate's size is high enough to qualify, file IRS 706 U.S. Estate Tax Return
	If estate's size is high enough to qualify, file State Estate Form (ET-1)
	Provide tax preparer with copy of the Will, Letters of Appointment, Inventory & Appraisal from the
	Probate Court, the Trust and all Amendments, and IRS Form 706 received from life insurance
	carriers for proceeds they paid
	Prepare and file IRS form 1041 U.S. Income Tax Return for Estates and Trusts (" fiduciary retu
) and CA form 541, if necessary
	If estate's size is high enough to qualify, file IRS 1041-ES Voucher for estimated, taxes, Fiducia
	Tax Return for Trust, and CA 541-ES
	Income Tax - Fed Annual 1040
	Income Tax - State Annual 540
	IRS forms 1310 (refund due a deceased taxpayer), 56 (Representative for Estate), 2848 (Powers of Attorney)
	of Attorney) California Franchise Tax Board Form 3510
	Camornia rianchise Tax Board Form 3510
CURCODISTIONS & MEMBERSHIPS	Control consol
SUBSCRIPTIONS & MEMBERSHIPS	Costco cancel AAA cancel
	Public Library: Cancel card, return books, pay (or seek waiver) of overdue fines.
	Magazines: Cancel. Seek return of pre-paid subscription, if applicable.
	Airlines: cancel any tickets for future, seek refund.
	Airlines: seek transfer of frequent flyer miles.
	Annities, seek transfer of frequent type finites.
LEGAL	Locate key to safe, if any.
See also TAXES and REAL ESTATE	Inventory items in safe
DUC 430 TANEO AND NEAL ESTATE	Deposit Will for registration with the S.D. Superior Court - Probate Division. (Affix bluebacking)
'	within thirty (30) days of death, and obtain Receipt for it.
	"Notification by Trustee" California Probate Code 16061.7 to potential beneficiaries re: time lim
	to contest the trust.
	"Trustee's Duty to Report Information": Prepare and mail to Trust beneficiaries per CA Probate
	Code Section 16061.5
	Prepare "Account to Beneficiaries" or obtain Waiver
	Prepare and mail to Trust beneficiaries their: "Distributive Trust Share"
	Prepare and mail "Receipt for Distribution" for each beneficiary to sign. Obtain returned signer
	Copies.
	Prepare and mail "Waiver of Accounting" for each beneficiary to sign. Obtain returned signed
	conies
	copies. Prepare "Certification of Trust" to show Trust is active and Successor Trustee.

Amend Trust If Surviving Spouse, amend Surviving Spouse's Will If Surviving Spouse, amend Surviving Spouse's Financial Durable Power of Attorney If Surviving Spouse, amend Surviving Spouse's Advance Health Care Directive	POST-DEATH TASKS CHECK LIST	12/10/201
If Surviving Spouse, amend Surviving Spouse's Advance Health Care Directive Affidavit For Collection of Personal Property per CA Probate Code Sec. 13100 et seq. to financial accounts not in Trust's name. NOTICES &/or THANK YOUS Telephone immediate family & friends Mail or call less close family and friends Primary care physician Nursing Home Home care agency Caregiver Dentist Church Prior Church House cleaners Obtivary in local newspaper Newspaper stop Gas & Electric keep on until house is sold Water/sever keep on until house is sold Water/sever keep on until house is sold Cable TVInternet, cancel, return moderns, get receipt Cable TVInternet, pay final bill ATAT land line: cancel ATAT pay final bill Registrar of Voters Notice to landlord (3/4) Peat Control (3/4) Peat Control (3/4) Peat Control (3/4) Peat Service arrange to forward mail to appropriate address/es). Gardener (3/4) REAL ESTATE Inventory repairs to be made before a sale. Painting registies, select colors, complete including patching Plumbing, repair as needed Remove puttines before a sale. Turn off Furnace before a sale. Donate remaining property(?) If Real Estate to self, decide on realtor and price, sign listing agreement Opens selection Escrow Opens Inspection of property by buyer Real Estate Transfer Disclosure Statement; Disclosure of Lead, etc Appraisa vs. purchase price Natural and evironmental hazards report Escrow Closed Escrow Closed Escrow Closed		
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Distribute cash		
Close Trust		
Notices to Fed and State		

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