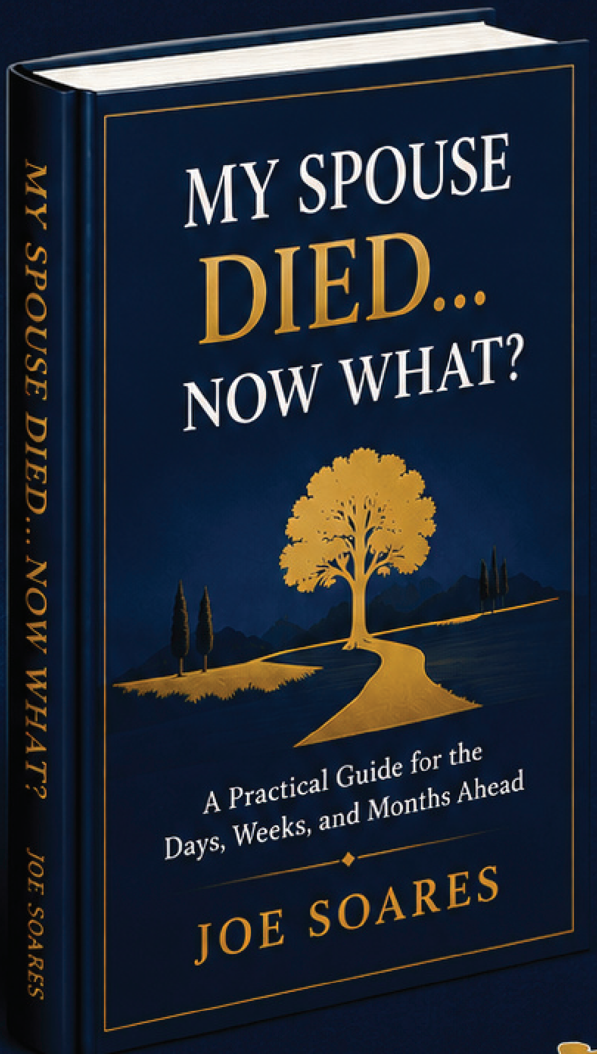
MY SPOUSE DIED... NOW WHAT?



PROBATE ADMINISTRATION

COMPANION RESOURCE

Supplemental Materials
for Estate Administration and Probate

SUPPLEMENTAL COMPANION RESOURCE

For readers of My Spouse Died... Now What?

JOE SOARES

JoeSoaresMusic.com

This Companion Resource is provided as supplemental material for readers of ***My Spouse Died... Now What?***

JOE SOARES

JoeSoaresMusic.com

PROBATE TIMELINE

A Step-by-Step Roadmap Through Estate Administration

Every estate is unique. This timeline is a general guide. Some steps may occur simultaneously or not be required in your situation.

STEP	WHAT YOU DO	WHAT HAPPENS	TARGET TIMEFRAME*
1	**DEATH** Obtain certified death certificates.	The legal process begins on the date of death. Certified death certificates are needed for banks, insurance, and the court.	**IMMEDIATE (0 – 7 Days)**
2	**LOCATE WILL** Find the original Will and review its provisions.	The Will names the Executor and outlines how the estate should be handled and distributed.	**1 – 2 WEEKS**
3	**MEET WITH ATTORNEY** Discuss the estate and determine if probate is required.	The attorney explains the probate process, your responsibilities, costs, and timeline.	**1 – 3 WEEKS**
4	**FILE FOR PROBATE** Petition the court to open the estate and submit required documents.	The court is asked to open the estate. A case number is assigned.	**2 – 4 WEEKS**
5	**LETTERS OF ADMINISTRATION** Court reviews the petition and issues authority to the Executor.	The Executor (or Personal Representative) is legally authorized to act on behalf of the estate.	**2 – 6 WEEKS**
6	**NOTIFY CREDITORS & BENEFICIARIES** Notify all heirs, beneficiaries, and creditors as required by law.	Creditors are given a timeframe to file claims. Beneficiaries are informed of the probate.	**4 – 12 WEEKS (Notice Period)**
7	**INVENTORY ASSETS** Identify, gather, and value all estate assets.	All assets are located, secured, and valued as of the date of death.	**1 – 3 MONTHS**
8	**PAY DEBTS & EXPENSES** Pay valid creditor claims, taxes, and estate expenses.	Debts, taxes, and administrative expenses are paid in the proper order of priority.	**3 – 6 MONTHS**
9	**FINAL ACCOUNTING & DISTRIBUTION** Prepare final accounting and distribute assets to beneficiaries.	The court is provided with a detailed accounting. After approval, remaining assets are distributed to beneficiaries.	**6 – 12 MONTHS**
10	**ESTATE CLOSES** File closing documents and obtain court approval to close.	The court signs an Order of Discharge. The estate is now officially closed.	**9 – 18 MONTHS** *Average Total Time*

* Timeframes are estimates only and vary by state, court schedules, estate complexity, and creditor response times.

"Commit thy works unto the LORD, and thy thoughts shall be established." – *Proverbs 16:3 (KJV)*

PROBATE vs. NON-PROBATE ASSETS

WHAT HAPPENS TO AN ASSET AFTER YOUR DEATH?

WHY THIS MATTERS
Understanding which assets avoid probate can save your loved ones time, stress, and significant costs.

IMPORTANT
State laws vary. Always consult an attorney or financial professional for advice specific to your situation.

START HERE

Does the asset have a surviving owner, beneficiary, or transfer designation?
(Examples: joint owner, payable-on-death, TOD, trust, beneficiar)

YES

Usually Transfers Outside Probate

The asset passes directly to the surviving owner or beneficiary.

Jointly Owned Property
Property owned with right of survivorship (JTWROS) passes to the surviving owner.

Transfer-on-Death (TOD) Vehicles
Vehicles with TOD designation pass to the named beneficiary.

Payable-on-Death (POD) Accounts
Bank or credit union accounts with POD designation pass to the named beneficiary.

Transfer-on-Death (TOD) Securities
Stocks, bonds, and mutual funds with TOD designation pass to the named beneficiary.

Life Insurance
Proceeds pass directly to the named beneficiary outside of probate.

Real Estate in a Trust
Real estate titled in a trust passes according to the trust terms.

Retirement Accounts (IRA, 401(k), 403(b), etc.)
Pass to the named beneficiary outside of probate.

Annuities
Pass to the named beneficiary outside of probate.

Trust Assets
Assets titled in a revocable or irrevocable trust pass according to the trust terms.

Other Beneficiary Designations
Certain assets like payable-on-death investment accounts, union benefits, or death benefits pass outside probate.

WHAT IS PROBATE?

Probate is the legal process of validating a will (if one exists), paying debts and taxes, and distributing the remaining assets according to the will or state law.

It can be time-consuming, public, and may involve court fees and attorney costs.

NO

May Become Part of the Probate Estate

The asset is controlled by the court-supervised probate process.

Solely Owned Real Estate
Homes, land, and other real property titled only in your name.

Bank Accounts (Without POD)
Accounts without a payable-on-death designation.

Vehicles (Without TOD)
Vehicles titled only in your name without TOD designation.

Investment Accounts (Without TOD)
Stocks, bonds, mutual funds, and brokerage accounts without transfer-on-death designation.

Personal Property
Jewelry, artwork, collectibles, furniture, and household items.

Business Interests
Ownership interests in sole proprietorships or partnerships.

Other Assets
Anything titled only in your name with no beneficiary designation or trust.

KEY POINTS TO REMEMBER

- Review all asset ownership titles and beneficiary designations regularly.
- Keeping designations up to date helps ensure your wishes are followed.
- Work with an attorney or financial advisor to create a plan that protects your loved ones.
- Keep this information with your important documents for easy reference.

★ **IMPORTANT:** *This chart provides general information only and is not legal advice. State laws vary. Consult an attorney for guidance specific to your situation and to ensure your estate plan is properly structured.*

PROBATE DOCUMENT CHECKLIST

GATHER. ORGANIZE. PROTECT.

Use this checklist to gather and organize important documents needed during the probate process.
Check each item as you locate it and note where it is stored.

DOCUMENT	DESCRIPTION	DESCATED (✓)	LOCATION (*Where Document Is Kept*)	NOTES (*Additional Details*)
☐ **DEATH CERTIFICATES**	Certified copies needed for banks, insurance, court, and other institutions.			
☐ **ORIGINAL WILL**	The original signed Will (not a copy).			
☐ **TRUST DOCUMENTS**	Revocable or irrevocable trust documents and any amendments.			
☐ **DEEDS**	Real estate deeds, including property held in the decedent's name.			
☐ **VEHICLE TITLES**	All vehicle titles (cars, trucks, RVs, boats, motorcycles, etc.).			
☐ **BANK STATEMENTS**	Recent statements for all checking, savings, CDs, and money market accounts.			
☐ **INVESTMENT STATEMENTS**	Brokerage, stock, bond, mutual fund, and annuity statements.			
☐ **LIFE INSURANCE POLICIES**	Policy documents and beneficiary designation forms.			
☐ **TAX RETURNS**	Last 3–5 years of federal and state tax returns.			
☐ **BENEFICIARY / POD FORMS**	Beneficiary designations for accounts, POD/TOD forms, and transfer-on-death deeds.			

IMPORTANT TIP:
Store all originalgnal documents in a secure, fireproof location. Make copies for your records and share the location of these documents with a trusted family member.

ADDITIONAL NOTES:

Well prepared today. Peace of mind tomorrow.

ESTATE ADMINISTRATION MASTER CHECKLIST

A Step-by-Step Guide to Settling an Estate

Use this checklist as a general guide to help you stay organized while administering an estate.
Every estate is different. State laws vary. Always consult an attorney for advice specific to your situation.

★ IMPORTANT
This checklist is not legal advice. Consult an attorney or trusted advisor.

STEP	TASKS TO COMPLETE	DATE COMPLETED	NOTES
1. IMMEDIATE FIRST STEPS	☐ Obtain multiple certified copies of the death certificate ☐ Secure the decedent's home and important property ☐ Locate the Will and any Trust documents ☐ Notify immediate family members ☐ Contact attorney (if needed) ☐ Determine if probate is required		
2. ADMINISTRATOR APPOINTMENT	☐ File petition with the court (if probate is required) ☐ Attend hearing (if required) ☐ Receive Letters Testamentary or Letters of Administration ☐ Obtain Employer Identification Number (EIN) for estate (if required) ☐ Open estate bank account (if needed)		
3. NOTIFY AND GATHER INFORMATION	☐ Notify beneficiaries and heirs ☐ Notify creditors (according to state law) ☐ Publish notice to creditors (if required) ☐ Gather financial, property, and account information ☐ Create estate asset inventory ☐ Review and secure documents and records		
4. INVENTORY AND VALUE ASSETS	☐ List all assets (real estate, accounts, investments, personal property, business interests, etc.) ☐ Obtain account statements and valuations ☐ Determine fair market value of assets ☐ Prepare formal inventory (if required) ☐ File inventory with the court (if required)		
5. MANAGE AND PROTECT ASSETS	☐ Maintain and protect estate property ☐ Pay ongoing bills (utilities, insurance, taxes, etc.) ☐ File small estate affidavit (if eligible and chosen) ☐ Consider selling assets (if authorized) ☐ Keep detailed records of all transactions		
6. PAY DEBTS AND EXPENSES	☐ Review and validate creditor claims ☐ Pay valid debts and final expenses ☐ Pay taxes (income, estate, or inheritance if applicable) ☐ Keep receipts and proof of payment ☐ Obtain releases from creditors (if possible)		
7. ACCOUNTING AND REPORTING	☐ Prepare accounting of income and expenses ☐ File interim accountings (if required) ☐ File final accounting with the court ☐ Provide copies to beneficiaries ☐ Obtain court approval of final accounting		
8. DISTRIBUTE ASSETS	☐ Distribute assets to beneficiaries according to the Will or state law ☐ Obtain signed receipts from beneficiaries ☐ Record and report distributions to the court ☐ Close estate bank account (if opened)		
9. CLOSE THE ESTATE	☐ File petition to close the estate ☐ Obtain order closing the estate ☐ Store estate records (keep for required period) ☐ Notify beneficiaries that estate is closed ☐ Celebrate the completion of this important responsibility		

TIPS FOR SUCCESS

- Keep everything organized in one place.
- Keep copies of everything you file or receive.
- Communicate regularly with beneficiaries.
- When in doubt, ask your attorney or advisor.
- Take breaks and take care of yourself.

TYPICAL TIMELINE (May Vary)

1–2 Months — Initial Steps and Court Filings → **2–6 Months** — Inventory, Valuation, and Notifications → **6–12 Months** — Pay Debts, File Taxes, and Accountings → **12+ Months** — Distribute Assets and Close Estate

★ **REMEMBER:** Every estate is unique. This checklist is a guide, not a substitute for legal advice. Consult an attorney for guidance specific to your situation and state laws.

ASSET OWNERSHIP WORKSHEET

WHY THIS MATTERS
Knowing how an asset is titled determines whether it will pass outside of probate or become part of the probate estate.

A Guide to Help You Identify How Each Asset Is Owned and What Happens to It

Use this worksheet to list your assets and how they are owned. This will help your loved ones understand which assets avoid probate and which may need to go through probate.

INSTRUCTIONS
List every asset you own. Attach additional pages if needed.

Name: ____________________ Prepared By: ____________________

Date Prepared: ____________________ Phone / Email: ____________________

ASSET DESCRIPTION (Bank Account, Home, Vehicle, etc.)	ACCOUNT / POLICY / TITLE #	OWNER(S) (How it is titled)	BENEFICIARY (If any)	PAYABLE ON DEATH OR TRANSFER ON DEATH? (POD / TOD)	IN TRUST? (Yes / No)	PROBATE? (Yes / No / Maybe)	LOCATION OF DOCUMENTS / STATEMENTS	NOTES
BANK ACCOUNTS (Checking, Savings, Money Market, CDs)								
INVESTMENT ACCOUNTS (Stocks, Bonds, Mutual Funds, Brokerage Accounts)								
REAL ESTATE (Primary Residence, Vacation Home, Land, etc.)								
VEHICLES (Cars, Trucks, RVs, Boats, Motorcycles, etc.)								
INSURANCE POLICIES (Life Insurance, Annuities, Long-Term Care)								
RETIREMENT ACCOUNTS (IRA, 401(k), 403(b), Pension, TSP, etc.)								
DIGITAL ASSETS (Online Accounts, Domains, Social Media, etc.)								
PERSONAL PROPERTY (Jewelry, Art, Collectibles, Firearms, etc.)								
BUSINESS INTERESTS (Business, LLC, Partnership, Sole Proprietorship)								
OTHER ASSETS (Loans to Others, Royalties, Other Valuable Items)								

HOW IT PASSES OUTSIDE PROBATE
- Joint Ownership with Right of Survivorship
- Payable-on-Death (POD)
- Transfer-on-Death (TOD)
- Beneficiary Designation
- Assets Held in a Revocable Living Trust

HOW IT TYPICALLY REQUIRES PROBATE
- Sole Ownership with No Beneficiary
- No POD / TOD Designation
- No Joint Owner
- No Trust

IMPORTANT TIP
Review this worksheet regularly and update it as your ownership, beneficiaries, and assets change.

Keep this worksheet in your Important Documents Binder for your loved ones.

ESTATE ASSET INVENTORY – BLANK WORKSHEET

RECORD ALL ASSETS OWNED BY THE DECEDENT

ESTATE INFORMATION

Decedent: ______________

Date of Death: ______________

Surviving Spouse: ______________

Prepared By: ______________

Date Prepared: ______________

INSTRUCTIONS: List every asset you know about as of the date of death. Include joint assets and assets with beneficiaries. Attach additional pages if more space is needed. Provide account numbers, values, and location of statements or documents.

	ASSET CATEGORY / DESCRIPTION (Be Specific)	OWNER (Decedent / Joint / Beneficiary)	ACCOUNT / POLICY / ID #	ESTIMATED VALUE (As of Date of Death)	LOCATION OF STATEMENTS / DOCUMENTS	NOTES (Beneficiary / Payable on Death / Transfer on Death)
1	Cash – Checking Accounts			$____________		
2	Cash – Savings Accounts			$____________		
3	Money Market Accounts / CDs			$____________		
4	Stocks / Bonds / Mutual Funds			$____________		
5	Retirement Accounts *(401k, IRA, Roth, Pension)*			$____________		
6	Life Insurance – Policy *(Face Amount / Cash Value)*			$____________		
7	Annuities			$____________		
8	Real Estate – Homestead			$____________		
9	Real Estate – Other *(Rental, Vacation, Land)*			$____________		
10	Vehicles (Auto, RV, Boat, *Motorcycle)*			$____________		
11	Business Interests			$____________		
12	Valuable Personal Property *(Jewelry, Art, Collectibles)*			$____________		
13	Household Contents *(Furniture, Appliances, Etc.)*			$____________		
14	Digital Assets / Online Accounts *(See Digital Inventory)*			$____________		
15	Other Assets *(Describe)*			$____________		

NOTES

- Use fair market value as of the date of death.
- Include assets in the decedent's name alone and in joint names.
- If value is unknown, write "Unknown" and update later as information becomes available.

SUMMARY (Page 1 of 2)

Total Assets Listed on Page 1: ____________

Total Estimated Value on Page 1: $____________

Total Number of Assets on Page 1: ____________

"The blessing of the Lord, it maketh rich, and he addeth no sorrow with it."
Proverbs 10:22 (KJV)

"Well done, good and faithful servant."
Matthew 25:23 (KJV)

PHOTOCOPY THIS PAGE AS OFTEN AS NEEDED.

ESTATE ASSET INVENTORY – BLANK WORKSHEET

RECORD ALL ASSETS OWNED BY THE DECEDENT

ESTATE INFORMATION

Decedent: ____________

Date of Death: ____________

Surviving Spouse: ____________

Prepared By: ____________

Date Prepared: ____________

INSTRUCTIONS: List every asset you know about as of the date of death. Include joint assets and assets with beneficiaries. Attach additional pages if more space is needed. Provide account numbers, values, and location of statements or documents.

	ASSET CATEGORY / DESCRIPTION (Be Specific)	OWNER (Decedent / Joint / Beneficiary)	ACCOUNT / POLICY / ID #	ESTIMATED VALUE (As of Date of Death)	LOCATION OF STATEMENTS / DOCUMENTS	NOTES (Beneficiary / Payable on Death / Transfer on Death)
16				$________		
17				$________		
18				$________		
19				$________		
20				$________		
21				$________		
22				$________		
23				$________		
24				$________		
25				$________		
25				$________		
26				$________		
27				$________		
28				$________		
29				$________		
30				$________		

NOTES

- Continue listing all assets on this page. Attach additional pages if more space is needed.
- Keep copies of all statements and documents with your estate records.

SUMMARY (Page 2 of 2)

Total Assets Listed on Page 2: ________

Total Estimated Value on Page 2: $________

Total Number of Assets on Page 2: ________

GRAND TOTAL

Total Assets (Pages 1 & 2): ________

Total Estimated Value: $________

Total Number of Assets: ________

"Well done, good and faithful servant."
Matthew 25:23 (KJV)

PHOTOCOPY THIS PAGE AS OFTEN AS NEEDED.

QUESTIONS FOR YOUR ATTORNEY

MEETING INFORMATION

Date:
Attorney:
Law Firm:
Phone:
Email:

INSTRUCTIONS: Use this worksheet to write down your questions before your meeting. Check the topics that apply to you and add additional questions you want to ask. Take notes on the answers provided.

1. ESTATE PLANNING BASICS

TOPIC	MY QUESTIONS	NOTES / ANSWERS
☐ What estate planning documents do you recommend for my situation?		
☐ Do my current documents need to be updated?		
☐ How often should I review my estate plan?		
☐ How can I make sure my wishes are followed?		
☐ What happens if I become incapacitated?		
☐ What happens if I do not have an estate plan?		
☐ Other questions:		

2. PROBATE & ADMINISTRATION

TOPIC	MY QUESTIONS	NOTES / ANSWERS
☐ Will my estate have to go through probate?		
☐ How long does probate usually take in Florida?		
☐ What are the costs and fees associated with probate?		
☐ Can probate be avoided?		
☐ Who should I name as Personal Representative?		
☐ Other questions:		

3. ASSETS & PROPERTY

TOPIC	MY QUESTIONS	NOTES / ANSWERS
☐ How should I title my assets to avoid probate?		
☐ Will jointly owned property transfer automatically?		
☐ How are real estate and personal property handled?		
☐ Are there tax consequences I should be aware of?		
☐ What steps should I take before transferring property?		
☐ Other questions:		

4. TAXES & BENEFITS

TOPIC	MY QUESTIONS	NOTES / ANSWERS
☐ Will my estate be subject to federal estate tax?		
☐ What about Florida estate tax?		
☐ How does the portability of the federal exemption apply to me?		
☐ Are there inheritance tax considerations?		
☐ How will my beneficiaries be affected for taxes?		
☐ Other questions:		

5. HEALTH CARE & INCAPACITY

TOPIC	MY QUESTIONS	NOTES / ANSWERS
☐ Do you recommend a Durable Power of Attorney?		
☐ What is the difference between a Living Will and a Designation of Health Care Surrogate?		
☐ How can I make sure my health care wishes are honored?		
☐ What should I consider if I need long-term care?		
☐ Other questions:		

6. OTHER IMPORTANT QUESTIONS

TOPIC	MY QUESTIONS	NOTES / ANSWERS

Asking the right questions today brings clarity and peace of mind for tomorrow.

COMPANION RESOURCE
My Spouse Died... Now What?
Your Step-by-Step Guide to Peace of Mind and Clear Next Steps

Debt & Creditor Tracker

Companion Resource

Use this worksheet to record and organize information about every debt and creditor. This will help you keep track of what is owed, to whom, and the steps needed to pay, transfer, or resolve each account.

Estate Information

Decedent: ______________

Date of Death: ______________

Surviving Spouse: ______________

Prepared By: ______________

Date Prepared: ______________

How to use this worksheet

List every debt, loan, credit card, or other amount owed. Record the creditor's contact information, account number, current balance, and payment details. Include notes about what needs to be done and the status of each debt.

Helpful tips

- Keep all statements and written correspondence.
- Note due dates and payment amounts.
- Update this worksheet as debts are paid, transferred, or resolved.

Creditor / Company	Type of Debt (Loan, Credit Card, Mortgage, Etc.)	Account Number (Last 4 Digits)	Current Balance	Minimum Payment	Due Date	Interest Rate (%)	Contact Phone / Website	Status / Notes

Notes

____

____

____

____

Debt Summary

Total Number of Debts: .... ________

Total Minimum Payments (Monthly): .... $__________

Total Outstanding Balance: .... $__________

Debts Paid or Resolved: .... ________

Debts Needing Attention: .... ________

"Commit thy way unto the LORD; trust also in him; and he shall bring it to pass."
Psalm 37:5 (KJV)

CREDITOR NOTIFICATION TRACKER

BLANK WORKSHEET – CARTER ESTATE

Record all creditor notifications, responses, and account status.

ESTATE INFORMATION

Decedent:	William "Bill" Carter
Date of Death:	May 7, 2025
Surviving Spouse:	Helen Carter
Prepared By:	____________
Date Prepared:	____________

INSTRUCTIONS: List all known creditors and accounts. Record the date notified, method of notification, response received (if any), and current status. Attach copies of all correspondence, returns, and confirmations to the estate records.

#	CREDITOR / ACCOUNT	ACCOUNT NUMBER	TYPE OF DEBT / ACCOUNT	DATE NOTIFIED	METHOD (How Notified)	RESPONSE RECEIVED?	RESPONSE DATE	STATUS / NOTES
1	____________			__/__/__	________	☐ Yes ☐ No	__/__/__	____________
2	____________			__/__/__	________	☐ Yes ☐ No	__/__/__	____________
3	____________			__/__/__	________	☐ Yes ☐ No	__/__/__	____________
4	____________			__/__/__	________	☐ Yes ☐ No	__/__/__	____________
5	____________			__/__/__	________	☐ Yes ☐ No	__/__/__	____________
6	____________			__/__/__	________	☐ Yes ☐ No	__/__/__	____________
7	____________			__/__/__	________	☐ Yes ☐ No	__/__/__	____________
8	____________			__/__/__	________	☐ Yes ☐ No	__/__/__	____________
9	____________			__/__/__	________	☐ Yes ☐ No	__/__/__	____________
10	____________			__/__/__	________	☐ Yes ☐ No	__/__/__	____________
11	____________			__/__/__	________	☐ Yes ☐ No	__/__/__	____________
12	____________			__/__/__	________	☐ Yes ☐ No	__/__/__	____________
13	____________			__/__/__	________	☐ Yes ☐ No	__/__/__	____________
14	____________			__/__/__	________	☐ Yes ☐ No	__/__/__	____________
15	____________			__/__/__	________	☐ Yes ☐ No	__/__/__	____________

NOTES

- All letters and emails should be saved in the "Estate – Creditor Correspondence" folder.
- Certified mail receipts and tracking confirmations should be attached.
- Follow up on any creditor with "No Response" within 30 days.
- Never provide account numbers by email unless using a secure portal.

SUMMARY (Page 1 of 2)

Total Accounts on Page 1: ________

Responses Received on Page 1: ________

No Response (Follow-Up Needed) on Page 1: ________

"Well done, good and faithful servant."
Matthew 25:23 (KJV)

PHOTOCOPY THESE PAGES AS OFTEN AS NEEDED.

CREDITOR NOTIFICATION TRACKER

BLANK WORKSHEET – CARTER ESTATE (CONTINUED)

Record all creditor notifications, responses, and account status.

ESTATE INFORMATION

Decedent:	William "Bill" Carter
Date of Death:	May 7, 2025
Surviving Spouse:	Helen Carter
Prepared By:	________________
Date Prepared:	________________

INSTRUCTIONS: List all known creditors and accounts. Record the date notified, method of notification, response received (if any), and current status. Attach copies of all correspondence, returns, and confirmations to the estate records.

#	CREDITOR / ACCOUNT	ACCOUNT NUMBER	TYPE OF DEBT / ACCOUNT	DATE NOTIFIED	METHOD (How Notified)	RESPONSE RECEIVED?	RESPONSE DATE	STATUS / NOTES
16	________________			___/___/___	__________	☐ Yes ☐ No	___/___/___	________________
17	________________			___/___/___	__________	☐ Yes ☐ No	___/___/___	________________
18	________________			___/___/___	__________	☐ Yes ☐ No	___/___/___	________________
19	________________			___/___/___	__________	☐ Yes ☐ No	___/___/___	________________
20	________________			___/___/___	__________	☐ Yes ☐ No	___/___/___	________________
21	________________			___/___/___	__________	☐ Yes ☐ No	___/___/___	________________
22	________________			___/___/___	__________	☐ Yes ☐ No	___/___/___	________________
23	________________			___/___/___	__________	☐ Yes ☐ No	___/___/___	________________
24	________________			___/___/___	__________	☐ Yes ☐ No	___/___/___	________________
25	________________			___/___/___	__________	☐ Yes ☐ No	___/___/___	________________
26	________________			___/___/___	__________	☐ Yes ☐ No	___/___/___	________________
27	________________			___/___/___	__________	☐ Yes ☐ No	___/___/___	________________
28	________________			___/___/___	__________	☐ Yes ☐ No	___/___/___	________________
29	________________			___/___/___	__________	☐ Yes ☐ No	___/___/___	________________
30	________________			___/___/___	__________	☐ Yes ☐ No	___/___/___	________________

NOTES

- All letters and emails should be saved in the "Estate – Creditor Correspondence" folder.
- Certified mail receipts and tracking confirmations should be attached.
- Follow up on any creditor with "No Response" within 30 days.
- Never provide account numbers by email unless using a secure portal.

SUMMARY (Page 2 of 2)

Total Accounts on Page 2: ________

Responses Received on Page 2: ________

No Response (Follow-Up Needed) on Page 2: ________

"Well done, good and faithful servant."
Matthew 25:23 (KJV)

PHOTOCOPY THESE PAGES AS OFTEN AS NEEDED.

CREDITOR CORRESPONDENCE LOG – BLANK

WORKSHEET

Record of all written communications with known creditors.

ESTATE INFORMATION

Decedent: ____________

Date of Death: ____________

Surviving Spouse: ____________

Prepared By: ____________

Date Prepared: ____________

INSTRUCTIONS: Record every letter, email, notice, or other written communication sent or received from creditors or companies. Include the date, method, and a brief summary or purpose. Keep copies in the estate records.

#	DATE	CREDITOR / COMPANY	TYPE OF CORRESPONDENCE (Sent / Received)	SUMMARY / PURPOSE	METHOD (Mail / Email / Online / Fax)	RESPONSE RECEIVED? (Yes / No)	FOLLOW-UP DATE
1	___/___/_____					☐ Yes ☐ No	___/___/_____
2	___/___/_____					☐ Yes ☐ No	___/___/_____
3	___/___/_____					☐ Yes ☐ No	___/___/_____
4	___/___/_____					☐ Yes ☐ No	___/___/_____
5	___/___/_____					☐ Yes ☐ No	___/___/_____
6	___/___/_____					☐ Yes ☐ No	___/___/_____
7	___/___/_____					☐ Yes ☐ No	___/___/_____
8	___/___/_____					☐ Yes ☐ No	___/___/_____
9	___/___/_____					☐ Yes ☐ No	___/___/_____
10	___/___/_____					☐ Yes ☐ No	___/___/_____
11	___/___/_____					☐ Yes ☐ No	___/___/_____
11	___/___/_____					☐ Yes ☐ No	___/___/_____
12	___/___/_____					☐ Yes ☐ No	___/___/_____
14	___/___/_____					☑ Yes ☐ No	___/___/_____
15	___/___/_____					☐ Yes ☐ No	___/___/_____

NOTES

- Keep copies of all letters, emails, and responses in the "Estate – Creditor Correspondence" folder.
- Certified Mail receipts and tracking confirmations are attached to this log.
- Follow up with any creditor that does not respond within 30 days.
- Use the continuation page if more space is needed.

SUMMARY (Page 1 of 2)

Total Correspondence Entries on Page 1: ____________

Responses Received on Page 1: ____________

No Response (Follow-Up Needed) on Page 1: ____________

"Commit thy way unto the Lord; trust also in him; and he shall bring it to pass."
Psalm 37:5 (KJV)

PHOTOCOPY THIS PAGE AS OFTEN AS NEEDED.

CREDITOR CORRESPONDENCE LOG – BLANK

WORKSHEET (CONTINUATION)

Record of all written communications with known creditors.

ESTATE INFORMATION

Decedent: ____________

Date of Death: ____________

Surviving Spouse: ____________

Prepared By: ____________

Date Prepared: ____________

INSTRUCTIONS: Record every letter, email, notice, or other written communication sent or received from creditors or companies. Include the date, method, and a brief summary or purpose. Keep copies in the estate records.

#	DATE	CREDITOR / COMPANY	TYPE OF CORRESPONDENCE (Sent / Received)	SUMMARY / PURPOSE	METHOD (Mail / Email / Online / Fax)	RESPONSE RECEIVED? (Yes / No)	FOLLOW-UP DATE
16	___/___/_____					☐ Yes ☐ No	___/___/_____
17	___/___/_____					☐ Yes ☐ No	___/___/_____
18	___/___/_____					☐ Yes ☐ No	___/___/_____
19	___/___/_____					☐ Yes ☐ No	___/___/_____
20	___/___/_____					☐ Yes ☐ No	___/___/_____
21	___/___/_____					☑ Yes ☐ No	___/___/_____
22	___/___/_____					☐ Yes ☐ No	___/___/_____
23	___/___/_____					☐ Yes ☐ No	___/___/_____
24	___/___/_____					☐ Yes ☐ No	___/___/_____
25	___/___/_____					☑ Yes ☐ No	___/___/_____
26	___/___/_____					☐ Yes ☐ No	___/___/_____
27	___/___/_____					☑ Yes ☐ No	___/___/_____
28	___/___/_____					☑ Yes ☐ No	___/___/_____
29	___/___/_____					☑ Yes ☐ No	___/___/_____
30	___/___/_____					☐ Yes ☐ No	___/___/_____

NOTES

- Keep copies of all letters, emails, and responses in the "Estate – Creditor Correspondence" folder.
- Certified Mail receipts and tracking confirmations are attached to this log.
- Follow up with any creditor that does not respond within 30 days.
- Use the continuation page if more space is needed.

SUMMARY (Page 2 of 2)

Total Correspondence Entries on Page 2: ____________

Responses Received on Page 2: ____________

No Response (Follow-Up Needed) on Page 2: ____________

"Commit thy way unto the Lord; trust also in him; and he shall bring it to pass."
Psalm 37:5 (KJV)

PHOTOCOPY THIS PAGE AS OFTEN AS NEEDED.

SAFE DEPOSIT BOX INVENTORY

ESTATE ADMINISTRATION COMPANION RESOURCE

Inventory of Safe Deposit Box Contents

Estate of: ______________________

Decedent: ______________________

Date of Death: ______________________

Personal Representative: ______________________

County: ______________________

Case / File No.: ______________________

DATE INVENTORIED: ______________

1 SAFE DEPOSIT BOX INFORMATION

Bank Name: ______________________

Branch Location: ______________________

Address: ______________________

____

Phone: ______________________

Safe Deposit Box Number: ______________________

Key Number (if known): ______________________

Date Opened for Inventory: ______________________

Individuals Present:

____

____

2 INVENTORY OF CONTENTS

#	ITEM DESCRIPTION	QUANTITY	REMOVED?	DATE REMOVED	INITIALS
1			☐ Yes ☐ No		
2			☐ Yes ☐ No		
3			☐ Yes ☐ No		
4			☐ Yes ☐ No		
5			☐ Yes ☐ No		
6			☐ Yes ☐ No		
7			☐ Yes ☐ No		
8			☐ Yes ☐ No		
9			☐ Yes ☐ No		
10			☐ Yes ☐ No		
11			☐ Yes ☐ No		
12			☐ Yes ☐ No		
13			☐ Yes ☐ No		
14			☐ Yes ☐ No		
15			☐ Yes ☐ No		

3 IMPORTANT DOCUMENTS FOUND

- ☐ Original Will
- ☐ Trust Agreement
- ☐ Codicil
- ☐ Durable Power of Attorney
- ☐ Health Care Directive
- ☐ Living Will
- ☐ Deeds
- ☐ Vehicle Titles
- ☐ Stock Certificates
- ☐ Bonds
- ☐ Life Insurance Policies
- ☐ Military Records
- ☐ Birth Certificates
- ☐ Marriage Certificate
- ☐ Social Security Documents
- ☐ Cash
- ☐ Jewelry
- ☐ Coins
- ☐ Keys
- ☐ Other: ______________

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4 NOTES

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IMPORTANT REMINDER:
Keep an accurate record of all items removed from the safe deposit box. Store items securely and follow court or attorney instructions regarding any documents or assets found.

"A good man leaveth an inheritance to his children's children..."

PROVERBS 13:22 (KJV)

DISTRIBUTION RECEIPT

ESTATE ADMINISTRATION COMPANION RESOURCE

Acknowledgment of Property or Funds Received

ESTATE OF: ______________________

COUNTY: ______________________

CASE / FILE NO.: ______________________

PERSONAL REPRESENTATIVE: ______________________

RECIPIENT / BENEFICIARY: ______________________

DATE OF DISTRIBUTION: ______________________

DATE RECEIPT PREPARED

____

Use this receipt to document the distribution of money, personal property, real property, or other estate assets to a beneficiary or other recipient.

1 DISTRIBUTION DETAILS

Description of cash, property, or other asset distributed:

Estimated or stated value of distribution: ______________________

Method of distribution (check, transfer, delivery, deed, other): ______________________

Check number, transaction reference, or identifying information: ______________________

2 RECIPIENT ACKNOWLEDGMENT

I acknowledge that I received the distribution described above from the estate. I understand that this receipt documents delivery only and does not alter the terms of the will, trust, court order, settlement agreement, or applicable law.

- ☐ The property or funds were received in satisfactory condition.
- ☐ The distribution was received in full.
- ☐ The distribution was received as a partial distribution.
- ☐ Additional explanation is provided in the notes section below.

3 SIGNATURES

______________________ *Recipient / Beneficiary Signature*

______________________ *Printed Name*

______________________ *Personal Representative Signature*

______________________ *Date*

______________________ *Witness (optional)*

NOTES OR ADDITIONAL DESCRIPTION

____

____

____

____

____

"Moreover it is required in stewards, that a man be found faithful."

1 CORINTHIANS 4:2

KJV

MILEAGE LOG FOR EXECUTOR

ESTATE ADMINISTRATION COMPANION RESOURCE

Track Mileage for Estate-Related Travel

Estate of: ______________________

Decedent: ______________________

Date of Death: ______________________

Personal Representative: ______________________

County: ______________________

Case / File No.: ______________________

LOG PERIOD:

__________ to __________

1 INSTRUCTIONS

Use this log to record all mileage for estate-related travel. Only mileage directly related to estate administration may be reimbursed. Keep all receipts and supporting documentation.

2 MILEAGE LOG

DATE	FROM (STARTING LOCATION)	TO (DESTINATION)	PURPOSE / DESCRIPTION	MILES DRIVEN	ODOMETER START	ODOMETER END

3 ALLOWABLE PURPOSES (EXAMPLES)

- ☐ Court Hearings / Filings
- ☐ Meeting with Attorney
- ☐ Meeting with Accountant
- ☐ Meeting with Financial Advisor
- ☐ Bank / Investment Institutions
- ☐ Appraisal or Property Inspection
- ☐ Real Estate / Property Management
- ☐ Insurance Company
- ☐ Tax Preparation
- ☐ Estate Sale / Liquidation
- ☐ Storage Facility
- ☐ Post Office / Mailing
- ☐ Other (Specify): ______________________

4 NOTES

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5 SUMMARY

Total Miles This Period: ____________

Mileage Rate Used: $ __________ per mile

Total Reimbursement Requested: $ ______________________

Personal Representative Signature: ______________________ Date: ____________

IMPORTANT REMINDER:

Keep this mileage log with your receipts and documentation.
Mileage reimbursement rates are set by the Internal Revenue Service.
Check the current IRS standard mileage rate at IRS.gov.

"Whatsoever ye do, do all to the glory of God."

1 CORINTHIANS 10:31 (KJV)

ESTATE CLOSING CHECKLIST

Complete Every Step. Close with Confidence. Peace of Mind.

Use this checklist to ensure all final tasks are completed before closing the estate.

Estate of: ____________________

Executor / Personal Representative: ____________________

Estate / Case No.: ____________________

Date of Death: ____________________

Date Checklist Started: ____________________

TASK	DESCRIPTION	DATE COMPLETED	INITIALS	NOTES
☐ **FINAL ACCOUNTING**	Prepare and file the final accounting with the court showing all receipts, payments, and distributions.			
☐ **COURT APPROVAL**	Obtain court approval of the final accounting and proposed distributions.			
☐ **DISTRIBUTIONS COMPLETED**	Distribute all remaining estate assets to the beneficiaries as approved by the court.			
☐ **RECEIPTS SIGNED**	Obtain signed receipts from all beneficiaries confirming receipt of their inheritance.			
☐ **FINAL TAX RETURNS FILED**	File all required federal and state tax returns (including estate tax returns, if applicable).			
☐ **CREDITORS CLAIMS RESOLVED**	Ensure all valid creditor claims have been paid and all claim periods have expired.			
☐ **ACCOUNTS CLOSED**	Close all bank, brokerage, and other accounts held in the name of the estate.			
☐ **FINAL REPORTS FILED**	File any required final reports with the court or other agencies.			
☐ **ESTATE CLOSED**	Obtain the court's Order Discharging the Executor / Personal Representative and closing the estate.			

IMPORTANT REMINDERS:

- Keep copies of all final documents for at least 7 years (taxes) or permanently (real estate).
- Notify Social Security, Medicare, and other agencies of the decedent's passing (if not already done).
- Cancel any estate EIN with the IRS if no longer needed.

AFTER CLOSING:

- Store all estate records in a safe place.
- Provide beneficiaries with key documents.
- Celebrate the faithful completion of your responsibilities.

"Well done, good and faithful servant." — *Matthew 25:21 (NIV)*