



SUCCESSOR TRUSTEE CHECKLIST

This Checklist provides a list of steps for the Successor Trustee to follow upon the death of the Grantor. It outlines the most important items that need to be done in a trust administration. Please note that each trust administration is unique, therefore some steps are unanticipated and may not be included on this list.

Check as Accomplished

Task	Date
<input type="checkbox"/> Notify Personal Physician	_____
<input type="checkbox"/> Notify Mortuary and make Funeral/Cremation Arrangements Name & Phone #: _____	_____
<input type="checkbox"/> If Deceased is a Veteran, take Military Discharge papers to Mortuary (for V.A. headstone)	_____
<input type="checkbox"/> Order at least 12 Death Certificates through Mortuary	_____
<input type="checkbox"/> Determine if deceased would prefer a Memorial Donation (to the American Cancer Society, Church, ASPCA, etc.) in lieu of flower arrangements.	_____
<input type="checkbox"/> Prepare & deliver an Obituary Notice to Newspaper (including date/time/place of memorial services).	_____
<input type="checkbox"/> Notify immediate family, relatives & friends of decedent's passing.	_____
<input type="checkbox"/> Notify any important business associates of decedent's passing. Name & Phone #: _____	_____
<input type="checkbox"/> Notify Successor Trustees of decedent's passing and of their duties under the Trust. Name & Phone #: _____	_____
<input type="checkbox"/> Notify employer's personnel office of decedent's passing. Name & Phone #: _____	_____
<input type="checkbox"/> Notify Social Security Office of decedent's passing.	_____
<input type="checkbox"/> Notify Life Insurance Companies of decedent's passing by Certified Mail (include the Death Certificate & Policy Number).	_____

SUCCESSOR TRUSTEE CHECKLIST (CONT.)

Check as Accomplished

Task

Date

Cancel credit cards. _____

Check safe deposit box for special instructions or letters/cassette tapes with messages from deceased. _____

Location of Key Is: _____

Persons Authorized for Access:

Name & Phone #: _____

Name & Phone #: _____

Bank & Box Number: _____

Notify beneficiaries of Grantor's death and summarize trust terms as required by California Probate Code Section 16061.7. _____

Set up Living Trusts for beneficiaries to protect them. _____

When making distributions to beneficiaries, get a receipt for Trustee's legal protection. _____

If Spouse survives the deceased, continue to maintain Income Tax Records – usually there will be a Joint Return for the year the deceased died. _____

If the decedent was living alone: _____

Remove important documents and valuables to a safe location until Trust distribution instructions are ready to be fulfilled. _____

Secure any keys to vehicles and real property. _____

Change locks to real property. _____

Notify utility company and phone company of decedent's passing and continue paying utility bills in order to maintain the real property. _____

Advise U.S. Post Office where to send mail. _____



SUCCESSOR TRUSTEE CHECKLIST (CONT.)

ENSURE ALL DOCUMENTS, RECORDS, SAFE DEPOSIT BOX KEYS ARE ORGANIZED FOR EASY SETTLEMENT OF THE ESTATE AND TO REDUCE THE BURDEN OF ADMINISTRATION ON LOVED ONES. ALSO PLEASE ENSURE THAT YOUR SUCCESSOR TRUSTEE HAS ACCESS

YOU SHOULD TAKE THE OPPORTUNITY TO LEAVE A CASSETTE TAPE RECORDED MESSAGE OR WRITE A SPECIAL LETTER OF ADVICE AND ENCOURAGEMENT WHICH WILL BE READ AFTER YOUR DEATH.

