LEGACY
ESTATE PLANNING, LLC

PRE-PROBATE CHECKLIST

Helping guide your loved ones through life's toughest moments

If you recently lost a loved one, you may find yourself directly involved with the probate process if you are named as the Executor in the Last Will and Testament. As the Personal Representative of the estate, there are a few steps you need to take prior to opening probate. Ideally, these steps will be taken immediately upon being notified of the decedent's death.

- [ ] Determine if a **Last Will and Testament** was executed by the decedent. You will need an original copy of the Will if one exists. If you do not have one, ask family members or check with the decedent's estate planning attorney.

- [ ] Obtain several certified copies of the decedent's **death certificate** from the State of Washington Department of Health.

- [ ] **Secure assets.** Properly maintain and ensure the real property (Land and houses). Take possession of and maintain vehicles.

- [ ] We recommend speaking to an attorney **before** retitling and/or closing accounts in case there are any potential tax consequences.

- [ ] Locate additional **estate planning documents.** If the decedent had more than a basic estate plan, there will be additional estate planning documents that need to be located, such as: *Life insurance policies*, *Letters of instruction*, *Trust agreement*, *Funeral planning contact.*

- [ ] Start creating lists of **estate assets and debts.** To make your job as PR easier, include as much detail as possible with each entry, including things such as account numbers, passwords, current value, and location.

- [ ] Decide if the estate requires **formal probate.** Washington offers an alternative to formal probate for small estates. To be certain the estate qualifies for small estate administration, consult with an estate planning attorney.