

ADMINISTRATIVE CHECKLIST – DECEDENT’S ESTATE

Estate of _____ Fee Estimate: _____

Duty	Due Date	Initial When Completed
File Will with Court		
Inventory Safe Deposit Box		
Open Probate Estate		
Verify Insurance Coverage where Needed		
Compute Approximate Taxes and Administrative Expenses		
Marshall Assets		
Ascertain Creditors and Pay Debts		
Mail Creditor Notices		
Publish Claim Notice		
File Proof of Mailing and Publication		
Apply for Tax ID Number		
Open Estate Checking Account		
Notify IRS of Fiduciary Capacity		
Transfer Funds to Estate Account		
Collect Life Insurance		
File/Mail Inventory		
File Decedent’s Final Income Tax Return		
Decide on Estate’s Fiscal Year		
File Income Tax Returns for Estate		
File Federal Estate Tax Return and Pay Tax		
Request Prompt Audit of Income Tax Returns for Open Years (Forms 4810 and 5495)		
File State Estate Tax Return		
Make Distributions		
Pay Administrative Expenses		
Close Estate as Follows:		
FET Closing Letter		
State Closing Letter		
Prepare Final Report or Account		
Pay Expenses of Administration		
Record Notice of Probate and Release for Unsold Real Estate		
Final Report or Account		
Receipts of Distribution		
Order of Discharge		
Final Distribution		
File Final Income Tax Returns		
File Final Form 56		