HomeVine

Call 786-983-9208
www.homevineprobate.com
support@homevineoffer.com

We can list your property for sale or provide you with an as-is cash offer!

Probate Checklist

- ☐ Secure Any Real Estate
  - ☐ Post No Trespassing Notice (If real estate is vacant)
  - ☐ Obtain Vacant Property Insurance Rider (If real estate is vacant)
  - ☐ Make Sure Real Estate & Personal Property Is Locked Up & Secure
- ☐ Obtain The Death Certificate
- ☐ Get A Copy Of The Will (if applicable)
- ☐ Notify Life Insurance Company(ies) Of The Death
- ☐ Decide On Attorney Representation (unless filing pro-se, ie. filing without legal counsel)
- ☐ Determine Which Level Of Probate Is Necessary For The Estate
- ☐ File Probate With The County Clerk
- ☐ Run A Notice To Creditors In Newspaper
- ☐ Set Up A Bank Account For The Estate
- ☐ Set Up Auto-Pay Mortgages, Utilities & Similar Bills Paid Through Disposition
- ☐ Determine Legality & Timeframe For Selling Real & Personal Property
  (speak with a Probate attorney and a real estate professional who is familiar with Probate)
- ☐ Clean Out Any Real Property
  - ☐ Have Any & All Real Property (real estate) Repaired & Maintained
    - ☐ Lawn & Landscape Maintenance
    - ☐ Painting & Exterior Trim Repair
    - ☐ Mechanical Servicing Such As HVAC, Water Heaters, & Appliances
    - ☐ Interior Repairs & Maintenance Such As Plumbing, Electrical, Condition Upgrades, etc.
  - ☐ Identify & Divide Personal Property That Heirs Will Keep
  - ☐ Arrange For An Estate Sale Of Any Valuable Property That The Heirs Don't Want
  - ☐ Donate clothing & belongings that the heirs don't want to sell or keep
  - ☐ Schedule Cleanout Company To Dispose Of All Non-Valuable Items That The Heirs Don't Want
  - ☐ Arrange For A Final Cleaning Of The Property(ies)
- ☐ Sell Or Rent Any Inherited Real Estate--Call HomeVine at 786-983-9208 for a fair offer!

AS SEEN ON TV

VETERAN OWNED BUSINESS

We understand that dealing with probate can be a challenging and stressful experience. That's why we're here to help you every step of the way. Our Probate Checklist can help you navigate this process with ease, so you can focus on what matters most. Please do not hesitate to reach out if you need any assistance or if you or your family are even thinking about selling your inherited home.

- ☐ Start An Inventory Of Assets
  - ☐ Life Insurance _____
    _____
  - ☐ Investment Accounts _____
    _____
    _____
  - ☐ Checking & Savings Accounts _____
    _____
  - ☐ Employer Pay (ex: final paycheck, death benefits, etc.)_____
    _____
  - ☐ Debts _____
    _____
    _____
  - ☐ Valuable Personal Property _____
    _____
  - ☐ Real Estate (Equity) _____
    _____
  - ☐ Real Estate (Mortgages) _____
    _____
  - ☐ Other: _____

- ☐ Notify Known Creditors & Obtain Payoff Information - Have Them Discontinue The Accruement Of Interest
- ☐ Notify The Social Security Administration & Ensure Survivors Receive Benefits (If applicable)
- ☐ Finalize an asset distribution plan
  - ☐ Pay the estates final debts
  - ☐ Dispose of assets not going directly to heirs
  - ☐ Ensure the final distribution of assets to heirs in the will or according to state intestacy laws
- ☐ Pay the estates taxes
- ☐ Close the estate
- ☐ Close the estate bank account after all debts are settled and money is distributed
- ☐ File a final accounting with the probate court and ask for the estate to be closed