

TRUSTEE INSTRUCTIONS

Immediately at death:

- ❖ Contact our office at (619) 819-5085
- ❖ Review anatomical gift instructions
- ❖ Review memorial instructions and make funeral arrangements
- ❖ Contact relatives and close friends
- ❖ Notify newspaper for obituary
- ❖ Locate military papers (VA provides certain benefits & American Flag)
- ❖ Locate and review estate planning documents

Shortly after death: (once a death certificate has been issued)

- ❖ Check safe deposit box for important papers
- ❖ Notify insurance company/agent
- ❖ Notify company personnel department
- ❖ Notify Social Security Administration
- ❖ Notify California Department of Health
- ❖ Notify Franchise Tax Board
- ❖ Notify all advisors (Legal, Financial & Tax)
- ❖ Order death certificates (ten or more)
- ❖ Collect and cancel credit cards
- ❖ File mail forwarding notice

Within 30 days after death:

- ❖ Prepare Certification and Affidavit of Trust for Successor Trustee
- ❖ File original Will with county probate clerk
- ❖ Locate all estate assets and prepare an inventory of all assets
- ❖ Check to make sure insurance coverage is adequate
- ❖ Review business agreements

Within 60 days after death:

- ❖ Provide notice to heirs and beneficiaries
- ❖ Meet with advisors about distribution of property
- ❖ Obtain tax identification numbers for new trusts
- ❖ Review income tax returns with tax preparer

Within 9 months after death:

- ❖ Review the Memorandum for Specific Bequests
- ❖ Review the allocation and distribution of remaining assets
- ❖ Determine if disclaimer is to be prepared and filed
- ❖ File Federal Estate Tax Form 706
- ❖ Distribute assets