CHECKLIST — PROBATE READINESS

Legal & Core Documents

	Original will located (if one exists)
	Trust documents located (if applicable)
	Certified death certificates ordered
	Identification for the deceased gatheresd (ID, SSN, birth certificate)

Executor/Administrator Preparation

	Executor named in the will (if applicable)
	Potential administrator identified if no will exists
	Understanding of your role and responsibilities
	Decision made about whether to hire an attorney

Financial Information

	List of bank accounts started
	List of investment and retirement accounts started
	List of debts and recurring bills started
	Recent tax returns collected

Property & Asset Details

	Real estate documents located (deeds, mortgage statements)
	Vehicle titles located
	Insurance policies gathered
	Personal property and valuables identified

Communication & Security

	Home secured and documented
	Mail forwarding set up
	Credit frozen to prevent identity theft
	Key family members informed of next steps

CHECKLIST — PROBATE READINESS

Court & Administrative Readiness

	Court requirements reviewed for your state
	Appointment paperwork prepared (letters testamentary/administration)
	Estate bank account planned or ready to open
	Organized folder or binder created for all documents

Court & Administrative Readiness

- Original will located
- Death certificates ordered
- Executor identified
- List of assets started
- List of debts started
- Attorney consultation scheduled (if needed)

A Gentle Reminder

You don't need to have everything perfect before filing probate.
You simply need enough clarity to take the next step with steadiness.