

**CHECKLIST OF INITIAL RESPONSIBILITIES  
FOR  
PERSONAL REPRESENTATIVE**

This is a checklist of initial responsibilities for you to review and perform as a personal representative. The duties on this checklist consist primarily of identifying, protecting, and collecting estate assets. This is a general checklist and not every item may apply in your situation.

1. Remove valuables from the residence and place of business and store safely.
2. Consider changing locks if any property is not occupied by the spouse or primary beneficiary.
3. Determine immediate cash needs for any beneficiary. Identify accounts where cash is available and determine if there are any expenses that must be paid immediately.
4. Request postmaster to forward mail.
5. Inquire and determine the status of utilities on real estate including gas, electricity, and telephone.
6. Cancel charge accounts, credit cards, and magazine subscriptions.
7. Seek refunds where applicable.
8. Make sure that property and casualty insurance continues to cover personal effects, automobiles, real estate, and any personal property being stored.
9. If you have access to a safety deposit box with the decedent, **DO NOT REMOVE** contents. The safety deposit box should be inventoried in the presence of a bank officer and only then should contents be removed.
10. Gather personal records including checkbooks and statements for the last three years. Obtain copies of income tax returns for the last three years.
11. Contact any individuals who may owe money to the decedent and arrange for continued payment.
12. Gather all life and accident insurance policies. Don't forget to check with travel clubs, alumni associations, trade associations, credit card companies, mortgage insurance or any other organization that might make life insurance available to members.
13. Contact Social Security and the VA if applicable.
14. Hold any Social Security payments received after the date of death.
15. Check to make sure that the fire insurance continues to cover real estate, even a vacant dwelling.
16. Employ domestic help, security guards, or other type of assistance that might be required for a dependent or a beneficiary.