After a death: the trustee's plan

Prepared for _____ **Date** _____

Take care of the funeral and your family first. The "This week" steps are small. The rest can wait.

1 This week

- [ ] **Order death certificates**

  Order several certified copies. These are official copies with a seal. Banks, insurance companies, and others will each want one.

  A spouse, an adult child, and some other close family members can order them from the county vital records office. That is the county office that keeps birth and death records.

- [ ] **Keep everything safe**

  Keep the house insured, locked, and looked after. Put jewelry and other valuables somewhere safe.

  Do not move their money into your own account. Write down every dollar that comes in or goes out, and keep receipts.

- [ ] **Find the papers**

  The trust. The will. The Certification of Trust. The Personal Property Memorandum, if they filled one in. Deeds, bank statements, and insurance papers.

  Check each deed and account. Does it show the trust's name?

- [ ] **Decide if you will be the trustee**

  Being named does not make you the trustee. **You can say no.** Tell us soon if you might. Do not spend trust money until you decide.

  Named with someone else? You decide and act together.

- [ ] **Ask for your call with us**

  If The Hive Law made their trust, their plan includes a call with us for the person who takes over. **It is already paid for.**

You do not have to do this alone.

Questions? Go to thehivelaw.com/trustee-guide and fill in the form. Someone from The Hive Law will contact you.

2 In the next few weeks

- [ ] **File the will with the probate court**

  If you have the original will, take it to the probate court in the county where they lived. That is the county court that handles wills. Do it soon.

  Filing the will is not the same as opening a court case. It just puts the will on file.

- [ ] **Get the trust its own tax number**

  After a death, the trust usually needs its own tax ID number, called an EIN. You cannot keep using their Social Security number. An accountant (a CPA) can get it for you, or you can get it from the IRS, the federal tax office.

  Then open a bank account in the trust's name. Keep the trust's money there, never mixed with yours.

3 Within 60 days of the death

- [ ] **Tell the people who get something**

  Tell each person who gets something from the trust that the trust exists. Give them your name and your mailing address. A short letter is fine. Keep a copy.

4 Later

- [ ] **Pay the bills and taxes, then give out what the trust says**

  Pay the final bills. Their last income tax return still has to be filed. If the trust earns money after the death, it may need its own tax return. An accountant can do these for you.

  Keep enough back for taxes still to come. **Then** give out what the trust says, including anything on the Personal Property Memorandum.

  Is anyone who gets something under 18? Do not hand over their share.

Phone numbers you will need

Bank	**Accountant**
Insurance	**Funeral home**
Other	**Other**