

# After a Loved One Passes Away

## Estate Administration Worksheet (Will or Trust)

*This worksheet is designed to help families stay organized and understand the general steps to take after a loved one passes away when a will or trust is in place. This worksheet is for informational illustrative purposes in South Dakota only. It is not intended as legal advice.*

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### 1. Immediate Steps (First Few Days)

- Obtain legal pronouncement of death (hospital, hospice, or medical professional)
- Arrange funeral, burial, or memorial services
- Notify close family members and friends
- Secure the loved one's home, vehicles, and valuables
- Care for pets or dependents

#### Notes:

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### 2. Locate Estate Planning Documents

- Locate the original will
- Locate the trust document (if applicable)
- Find any amendments or restatements
- Identify who is named as: - Personal Representative (will) - Successor Trustee (trust)
- Gather related documents: - Powers of Attorney (financial & medical) - Healthcare directives - Deeds, titles, and beneficiary designations

#### Document Location(s):

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### 3. Contact Key People & Professionals

- Estate planning / probate attorney
- Trustee or personal representative (if not you)
- Financial advisor
- CPA or tax professional
- Employer (if applicable)
- Life insurance companies

#### **Contact Information:**

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### 4. Obtain Certified Death Certificates

- Request multiple certified copies (usually 5-10)
- Determine where copies will be needed: - Banks and financial institutions - Life insurance companies - Retirement accounts - Real estate transfers

#### **Number of copies ordered:** \_\_\_\_\_

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### 5. Review the Will or Trust

- Read the will or trust carefully
- Identify beneficiaries and distributions
- Confirm any specific instructions or timelines
- Note whether probate is required
- Determine if assets are held in trust

#### **Key Notes or Questions:**

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## 6. Start the Legal Process

### If There Is a Will (Probate)

- File the will with the probate court (if required)
- Petition to appoint the personal representative
- Obtain Letters Testamentary or Letters of Administration

### If There Is a Trust

- Accept appointment as successor trustee
- Review trust administration requirements
- Notify beneficiaries as required by law

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## 7. Notify Institutions & Agencies

- Social Security Administration
- Pension administrators
- Veterans Affairs (if applicable)
- Banks and credit unions
- Mortgage lenders
- Credit card companies
- Utility companies
- Insurance providers (health, auto, home)

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## 8. Inventory Assets & Debts

- Real estate
- Bank accounts
- Investment and retirement accounts
- Life insurance policies
- Business interests

- Personal property (vehicles, jewelry, collectibles, firearms, precious metal, crypto currency, social media accounts)
- Outstanding debts and bills

#### **Asset & Debt Notes:**

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## 9. Manage Ongoing Responsibilities

- Maintain insurance coverage
- Pay ongoing expenses and bills
- Manage or sell property as permitted
- Keep detailed records of all transactions
- Open an estate or trust bank account (if required)

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## 10. Taxes & Financial Matters

- File final personal income tax return
- File estate or trust tax returns (if required)
- Pay any outstanding taxes or debts
- Track deadlines carefully

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## 11. Distributions to Beneficiaries

- Confirm debts and taxes are paid or reserved
- Follow the will or trust instructions exactly
- Document distributions
- Obtain receipts or acknowledgments from beneficiaries

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## 12. Close the Estate or Trust

- Provide final accounting to beneficiaries

- Obtain court approval (if required)
- Close estate or trust accounts
- Retain records for future reference

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## Final Notes & Questions

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*If you feel overwhelmed or unsure at any stage, working with an experienced estate planning or probate attorney can help ensure everything is handled correctly and efficiently.*