

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.

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:

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):

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:

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: _____

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:

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:

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)

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

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

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

Final Notes & Questions

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.