



## Formal estate procedures

- ☐ File with Register of Wills, obtain short certificate
- ☐ Publish Notice of Estate
- ☐ Open estate account with financial institution
- ☐ Finalize debt, negotiate settlement
- ☐ Trusts, if identified
- ☐ File PA inheritance tax
- ☐ File final income tax
- ☐ File formal accounting or family settlement agreement
- ☐ Distribute net assets to heirs



## Pets

- ☐ Decedent may have Trust or direction for care of pet(s)
- ☐ Provide care until final decisions can be made for the pet(s)
- ☐ Locate pet(s) immunization and health records
- ☐ Locate ownership and/or registration papers

Death is not  
the opposite  
of life,  
but a part  
of it.

HARUKI MURAKAMI



## *contacts*

● Butler County Area Agency on Aging	724-282-3008
● Butler County Assistance Office	724-284-8844
● Butler County Bar Association	724-841-0130
● Butler County Register of Wills	724-284-1409
● Butler County Veterans Administration to obtain DD214, visit: <a href="https://vetrecs.archives.gov/VeteranRequest/home.html">https://vetrecs.archives.gov/VeteranRequest/home.html</a>	724-284-5179
● Social Security Administration	800-772-1213



This document is intended to be a guide, family situations  
may dictate additional and/or alternative steps



## From Death thru Estate Administration

A PRACTICAL CHECKLIST



A PROJECT OF THE  
BUTLER COLLABORATIVE FOR FAMILIES

*dedicated  
in loving memory of those  
forever in our hearts*

## When death occurs...



- ☐ In a hospital or facility: the facility will pronounce death, prepare paperwork (organ donation, if applicable), and coordinate with the funeral home or crematory of choice to receive the deceased
- ☐ In a private residence: if hospice is in place, call hospice agency, otherwise, call 9-1-1 to report death and request assistance. First responders will contact the coroner if needed. Contact funeral home of choice
- ☐ In an accident or unexpected event: call 9-1-1 for first responders

## Who is in charge?



- ☐ Schedule appointment with attorney
- ☐ Locate will and/or instructions from deceased
- ☐ If there is a will, the Executor will be named
- ☐ If there is no will in place, identify person to represent estate (normally, next of kin) and meet with the attorney. If family can't agree, the state will identify a representative

## Notification of death



- ☐ Family
- ☐ Friends
- ☐ Employer
- ☐ Landlord
- ☐ School/College
- ☐ Service Agencies
- ☐ Veterans Administration\*
- ☐ Social Security\*
- ☐ Gov't Assistance Programs
- ☐ Banks, Financial Services
- ☐ Pension(s)
- ☐ Utilities
- ☐ Credit Cards\*\*
- ☐ Mortgage | Loans\*\*
- ☐ Insurances\*\*
- ☐ Post Office

\*funeral home can assist

\*\*attorney can assist

## Funeral, burial, cremation arrangements



- ☐ Pre-paid plan, contact the funeral home
- ☐ Contact funeral home of choice to make arrangements and obtain death certificates
- ☐ Discuss costs and financial arrangements

### *helpful hints*

- ☒ The Federal Trade Commission requires general price lists from the funeral home or crematory to be provided upon request
- ☒ Burial or cremation assistance may be available if decedent received public assistance
- ☒ Fraternal, religious and veteran organizations may be able to conduct services and/or offer financial assistance

## Documents to gather for appointment with attorney



- ☐ All documents relating to financial affairs
- ☐ All documents relating to real and personal property ownership
- ☐ Will
- ☐ Safe deposit box(es)
- ☐ Trusts
- ☐ Insurances: health, property, life, vehicle
- ☐ Pension(s) and retirement accounts
- ☐ Marriage, birth and death certificates
- ☐ Divorce papers, if applicable
- ☐ Military records (DD214), if applicable
- ☐ Bank statements, stocks, bonds, cd's
- ☐ Mortgages, deeds, liens
- ☐ Motor vehicle title(s), loans
- ☐ Credit cards, debit cards, online accounts
- ☐ Outstanding bills
- ☐ Business ownership, relationships, if applicable