



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



From Death thru Estate Administration

A PRACTICAL CHECKLIST



contacts

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



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

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