

EVANS & ASSOCIATES

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ATTORNEY/ADVISORS CHECKLIST

1. Type of Probate

___ Affidavit

___ Set Aside

___ Summary Administration

___ Full Administration

___ Ancillary Probates in other states?

2. Confirm non-probate assets

___ IRAs and retirement plans
get beneficiary designation forms for each

___ Life insurance
send notice to each life insurance company to confirm coverage

___ Joint Tenancy property
may need Affidavits Terminating Joint Tenancy

3. 706 necessary ___ Yes ___ No
Net estate value: \$ _____
Due date: _____ (9 months after D.O.D.)
Extension to be filed: ___ Yes ___ No

4. Disclaimers
___ Yes by who?
Due by: _____ (9 months after D.O.D.)
___ No

5. Trust Administration?
___ No Trust
___ Yes:

