

IVEY FOSBINDER FOSBINDER LLC

A LIMITED LIABILITY LAW COMPANY

ELIZABETH A. IVEY
RHONDA M. FOSBINDER*¹
JAMES H. FOSBINDER*¹
RICHELLE M. THOMSON
*LLC MEMBERS
¹ADMITTED IN HI AND CA

2233 VINEYARD STREET, SUITE C
WAILUKU, HAWAII 96793
TEL: 808-242-4956
FAX: 808-249-0668
info@iff-law.com

CHECKLIST FOR DECEDENT'S AFFAIRS

We are sorry to learn that a loved one has died. While waiting for a death certificate (which is generally needed to open a probate or start a trust administration), there are some things you can do. The following checklist will assist you:

Your Name: _____

Your Address: _____

Your Telephone Nos.: _____

Your Email: _____

Relationship to Decedent: _____

1. Preliminary Information

a. Decedent's Full Name (include alias): _____

b. Date of Death: _____

c. Social Security Number: _____

d. Domicile: _____

e. Citizenship: _____

f. Place of Death: _____

g. Decedent's Address: _____

2. Burial Instructions.

Are there any writings of the decedent, including the Will and Codicils, containing burial or cremation instructions or other direction as to disposition of remains under Uniform Anatomical Gifts Act (Haw.Rev.Stat., Chapter 327). Also, check for organ donor designation on Hawaii driver's license or in an advance health care directive. _____

3. Safe Deposit Inventory.

Did the decedent have access to a safe deposit box? _____

Bank and location: _____

Title under whose name: _____

4. Last Will and Testament.

Did the decedent leave a Will of any type? _____

Where located? _____

5. Trust.

Did the decedent create a Trust? _____

What type of Trust? _____

Date of Trust/Amendments: _____

Location of Trust: _____

6. Burial Allowance and other Death Benefits.

Make an application for Social Security, Veterans and/or Employee death benefits, coordinate with mortuary to apply for Social Security or other burial allowances.

7. Perishable Property.

Does the Estate consist of any perishable property, pets needing care, etc.? _____

If arrangements have been made, what are they?

8. Emergencies.

Does an emergency exist with respect to any business, pending closing, perishable assets, etc.)? If so, let the attorney know immediately.

9. Immediate Needs for Funds.

Does the surviving spouse, or reciprocal beneficiary, a child or other dependant living with the decedent, or other successor have immediate needs for funds from bank accounts in which the decedent has an interest? _____

If so, let the attorney know immediately.

10. Notifications.

Notify financial institutions, banks, landlord and insurance companies, as applicable. Also, consider:

- _____ Stopping and forwarding mail
- _____ Stopping newspapers
- _____ Changing locks
- _____ Safekeeping of valuables
- _____ Lawn care
- _____ Lighting at night/securing home

11. Status of Casualty Insurance.

Is the house and all other real or personal property belonging to the decedent adequately insured in the event of fire, theft, loss or natural disaster? _____

12. **Status of Automobile.**

- a. Is the decedent's automobile jointly owned? _____
- b. If no surviving joint tenant, secure automobile and see that keys are in the hands of a responsible person. _____
- c. Determine whether auto insurance is current and whether it terminated at the decedent's death. _____

13. **Estate Tax Consideration.**

If the decedent may have more than \$1.5 million in assets (including retirement accounts, life insurance, jointly held property, etc.), please meet with the attorney prior to allowing any transfer of funds to beneficiaries, as there may be steps that can be taken to minimize any estate tax exposure.

Please feel free to call our office with any questions or concerns.

Ivey Fosbinder Fosbinder LLC
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2233 Vineyard Street, Suite C
Wailuku, HI 96793
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