ChecklistGuro

Estate Case Management Checklist Template

Intake & Initial Assessment

Gathering initial information and assessing the client's needs and situation.

Client Name

Write something...

Initial Client Narrative

Write something...

Date of Initial Contact

Enter date...

Relationship to Deceased

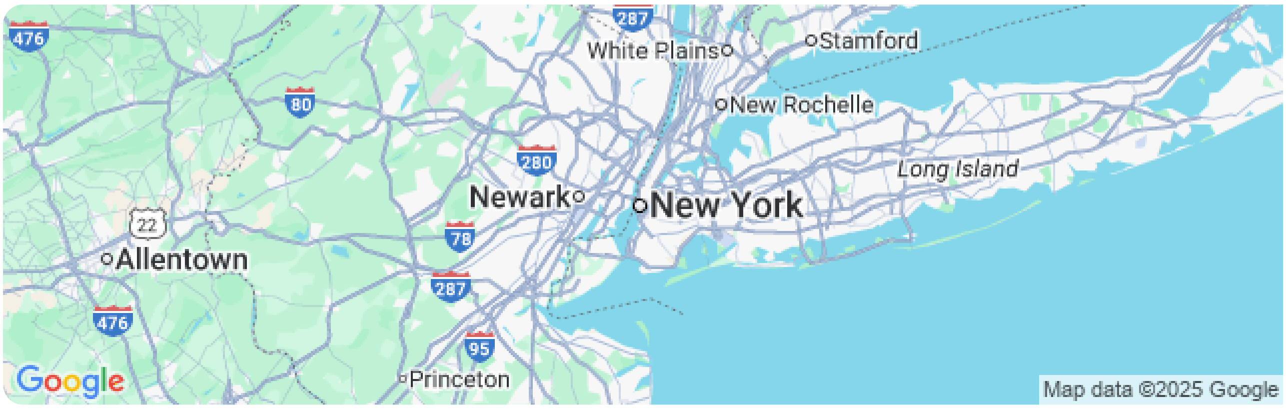
- [ ] Spouse
- [ ] Child
- [ ] Executor/Administrator
- [ ] Other

Approximate Value of Estate (USD)

Enter a number...

Client Residence Address

Set My Current Location



Client Communication Preference

- [ ] Email
- [ ] Phone
- [ ] Mail

Asset Identification & Valuation

Identifying and assessing the value of all estate assets.

Asset Description

Write something...

Estimated Value

Enter a number...

Asset Type

- [ ] Real Estate
- [ ] Bank Accounts
- [ ] Stocks & Bonds
- [ ] Vehicles
- [ ] Personal Property
- [ ] Business Interests

Date of Valuation

Enter date...

Valuation Documentation (e.g., Appraisal)

Upload File

Outstanding Loan/Mortgage (if applicable)

Enter a number...

Creditor Claims & Debt Management

Addressing creditor claims and managing outstanding debts.

Creditor Claim Amount

Enter a number...

Claim Status

- [ ] Pending Review
- [ ] Approved
- [ ] Rejected
- [ ] Under Negotiation

Claim Justification/Notes

Write something...

Claim Received Date

Enter date...

Supporting Documentation (Invoices, Agreements)

Upload File

Priority Level

- [ ] High
- [ ] Medium
- [ ] Low

Legal Proceedings & Court Filings

Managing legal proceedings and ensuring timely court filings.

Filing Deadline (Statute of Limitations)

Enter date...

Type of Legal Proceeding

- [ ] Probate Petition
- [ ] Accounting Petition
- [ ] Will Contest
- [ ] Other

Filed Petition Document

Upload File

Case Number (Assigned by Court)

Enter a number...

Hearing Date

Enter date...

Hearing Time

Enter time...

Notes from Court Appearance/Hearing

Write something...

Distribution & Beneficiary Communication

Distributing assets according to the will or applicable laws and communicating with beneficiaries.

Distribution Method Selected

- [ ] Direct Deposit
- [ ] Check
- [ ] Wire Transfer

Distribution Amount

Enter a number...

Distribution Date

Enter date...

Beneficiary Communication Log

Write something...

Beneficiary Acknowledgment Received

- [ ] Yes
- [ ] No

Beneficiary Acknowledgment Form

Upload File

Tax Compliance & Reporting

Ensuring compliance with all applicable tax regulations and filing necessary reports.

Federal Tax Return Filing Deadline

Enter date...

State Tax Return Filing Deadline

Enter date...

Gross Estate Value

Enter a number...

Taxable Estate Value

Enter a number...

Federal Estate Tax Due

Enter a number...

State Estate Tax Due

Enter a number...

Supporting Tax Documents (e.g., appraisal reports)

Upload File

Tax Professional Involved?

☐ Yes

☐ No

Closing & Finalization

Completing all necessary tasks to officially close the estate.

Date of Final Accounting Approval

Enter date...

Summary of Final Accounting Narrative

Write something...

Executor/Administrator Signature

Court Approval Signature (if required)

Final Distribution Amount

Enter a number...

Copy of Final Distribution Record

Upload File

Status of Outstanding Issues

- [ ] Resolved
- [ ] Unresolved - Further Action Required

Record Keeping & Documentation

Maintaining accurate and organized records throughout the entire process.

Date of Record Creation

Enter date...

Summary of Record Content

Write something...

Supporting Documents (e.g., receipts, correspondence)

Upload File

Page Number (if applicable)

Enter a number...

Record Type (e.g., Financial, Legal, Correspondence)

- [ ] Financial
- [ ] Legal
- [ ] Correspondence
- [ ] Other

Record Identifier/Reference Number

Write something...

Recorder's Signature