

TEXAS PROBATE SYSTEM

CHECKPLAN

NAME OF DECEDENT (D) _____

Note: To the extent that the client elects to be responsible for any of these steps, the client **MUST** furnish copies of all outgoing and incoming correspondence and documents. Although these steps are listed in approximate chronological order, it is not necessary to follow them in the exact order set forth in this Checkplan.

LEGEND: NA-NOT APPLICABLE L-LAWYER S-SUPPORT STAFF

INITIAL CONTACT

	NA	L	S	DATE	INITIALS
1. Do the following upon initial contact and learning of D's death:					
a. Determine immediate needs concerning—					
(1) Performance of an autopsy					
(2) Donation of body and/or organs for medical use (check D's driver's license and with Living Bank)					
(3) Disposition of body					
(4) Special burial, cremation, or donation instructions					
(5) Selection of funeral home					
(6) Funeral arrangements					
(7) Information to complete death certificate and prepare obituary notice. Be particularly careful concerning exact dates of death and birth. See Special Instruction 96—Identity Theft concerning information for obituaries.					
(8) Pallbearers					
(9) Fraternal organizations (such as Masons, K. of C., VFW) to be contacted					
(10) Care of minor or incapacitated children					
(11) Flag from VA if D was a veteran					
(12) Notification of clergyman, friends, relatives, and business associates					
(13) Care of livestock, pets, plants, and other perishable property					
(14) Security at home of D					

	NA	L	S	DATE	INITIALS
(15) Security at homes of D's relatives					
(16) Termination of home deliveries					
(17) Continued employment and compensation of appropriate household and business employees					
(18) Notification of professional organizations and alumni associations					
b. Advise family members to safeguard D's residence and to keep accurate records of all expenses incurred for the funeral, in notifying friends and relatives, and for other immediate arrangements.					
c. Recommend a thorough search of D's home and place of business for hidden assets.					
d. Recommend a thorough search of D's home and place of business for credentials to digital assets, including user IDs, passwords, and challenge questions. See Special Instruction 83—Digital Assets.					
e. Explain the Probate Information List (Form 1) (see Special Instruction 1—Probate Information List for explanation of Form 1).					
f. Make a prompt appointment to meet with client and members of the family.					
g. Consider sending flowers, contributions, or letters of sympathy.					
h. Open office file.					
i. Prepare and send Letter 1 to the person who will be responsible for gathering the documents and information together with a copy of the Probate Information List (Form 1).					