

Worksheets

- Worksheet 1 Proper Probate Procedure (Probate Pathfinder)
 - Worksheet 2 Insurance on D's Life
 - Worksheet 3 Checking and Savings Accounts and Certificates of Deposit
 - Worksheet 4 Reconcile D's Checking Account to Balance Furnished by Bank
 - Worksheet 5 Securities Transfer Record
 - Worksheet 6 Requirements for Filing Federal Estate (and Generation-Skipping Transfer) Tax Return (IRS Form 706)
 - Worksheet 7 Valuing Producing Mineral and Royalty Interests
 - Worksheet 8 Eligibility for Special Use Valuation under IRC, Section 2032A
 - Worksheet 9 Notice to Beneficiaries
 - Worksheet 10 Cash Requirements and Cash Available
- [Worksheets 11 and 12 are reserved for expansion.]*
- Worksheet 13 Claims against Estate
 - Worksheet 14 Marital Deduction under Transitional Rule
 - Worksheet 15 Probate Chart for All Active Estates Represented by This Firm