**Trust Administration General Checklist for Initial Consultation**

1. Get decedent’s mail forwarded to Trustee;

2. Marshal and inventory the assets of the estate and get all assets placed into the current trustee's name, as trustee of Decedent’s Trust. Provide DOD valuations on all assets.

3. A NEW Tax ID number for the trust should be pulled and all cash and security assets transferred into a new trust account, with the new Tax ID number attached to that account;

4. 16061.7 Notices to Beneficiaries should go out (potentially with waivers of 120-day period to contest the trust);

5. Notices of Decedent's death to the Franchise Tax Board, IRS - form 58, and Department of Healthcare Services MUST go out;

6. Affidavit of Death of Trustee, Death of Real Property Owner, and Prop 58- Parent to Child Exclusion from Property Tax Reassessment MUST be filed immediately if this has not been done already. There is a limited time frame that the prop 58 can be filed in order to capture the exclusion;

7. Determine if any assets of the estate are held in Decedent’s name only and whether an Affidavit of Small Estate must be prepared (post 40 days of death of decedent);

8. Decedent's Original Will must be filed with the clerk in County of decedent’s death;

98. Trustee must work with the property insurance company to place his name (and anyone residing at the property) as Additional Insureds on the property.

10. Any vehicle belonging to the trust estate must be maintained by the trustee, not driven by ANYONE, and insurance also updated to reflect that the trustee is the additional insured. The potential for liability is extremely large with a vehicle.

11. Contact the credit bureaus to place a block/freeze on decedent's credit, to avoid fraudulent transactions in the future;

12. Notify and pay all creditors and expenses of the estate;

13. And prepare and file decedent's final personal income taxes (when the time comes) AND the fiduciary income tax return (this is the trust income tax return).

14. Keep organized records.

15. Prepare account and report of trustee.

16. Receipts of Distribution (waiver of accounting?).

17. Hold back a reserve for final expenses.