

# STEPS TO SETTLING AN ESTATE: *One Step at a Time*

Losing a loved one is overwhelming, and settling their estate can feel like an impossible task. From gathering documents to distributing assets, every step requires careful attention to detail. That's why we created this simple, straightforward guide to help you through the process. If you need expert assistance, the professional resources at Sell Pop's Place can help you handle everything so you don't have to do it alone.

## Locate Key Documents

Start by gathering all necessary legal and financial paperwork, including:

- The will, trust, or estate plan
- Bank statements and financial records
- Property deeds and titles
- Insurance policies
- Retirement and investment account details

**Pro Tip: Missing documents? We can connect you with professionals that can help you track them down quickly.**

## Appoint an Executor

If your loved one left a will, it should name an executor. If no executor was appointed, the court will assign an administrator to manage the estate. Need guidance? We have trusted professionals that can help you navigate the legal process smoothly.

## File for Probate

Probate is the legal process of validating the will and administering the estate.


Depending on the estate's size, you may be able to bypass probate or expedite the process. Avoid delays! A trusted Estate attorney is a great place to start. We can connect you with professionals that can help you determine the best course of action

## Notify Beneficiaries & Creditors

Inform all heirs, creditors, and financial institutions of your loved one's passing. This includes:

- Notifying banks, mortgage lenders, and utility companies
- Sending death certificates to relevant institutions
- Alerting Social Security and pension providers

**Need support with this? Let us recommend great people to help you!**

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## Inventory All Assets

List all property, financial accounts, personal valuables, and outstanding debts. Be sure to secure any valuable assets to prevent loss or disputes. Not sure where to start? We've got a detailed checklist to help you keep track!

## Determine Estate Value

Obtain professional appraisals and assessments to calculate the total estate value, including real estate, personal property, and investments. We can connect you with trusted appraisers to get an accurate valuation.

## Pay Debts & Taxes

Before distributing assets, settle any outstanding debts, including:

- Credit card balances and loans
- Utility bills
- Final tax returns

**Want to ensure compliance? Let the experts help you!**

## Distribute Assets to Beneficiaries


Once debts and taxes are settled, distribute remaining assets according to the will or state law. Obtain signed receipts from beneficiaries to ensure a clear record. Our recommended estate lawyers can help with this!

## Close the Estate

The final step is filing a final accounting with the probate court and requesting formal estate closure. This sounds like work for one of our excellent, user friendly estate lawyers!

## Need Help? Sell Pop's Place Has You Covered!

Managing an estate is complicated, but you don't have to do it alone. Our referral list of professionals at Sell Pop's Place specializes in estate liquidation, probate assistance, asset management .... And almost any need that arises. We handle the heavy lifting so you can focus on what matters most—honoring your loved one's legacy.

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