How to Efficiently Settle the Family Estate

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BART WINDRUM



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CONTENTS

For Those Who Value Their Time	xii
Now You Have It, Now You Don't	15
Mentally Setting Aside Your Loss	19
Estate Settlement Overview	19
Assumptions	20
Range	22
Definitions	22
Authentication	22
Entity or Entities	22
Estate	22
Executor	23
Forecasting	23
Financial Power Documents	23
Quick Assets	23
Slow Assets	23
Disclaimer	23
Finding Qualified Professional Advisors	24
Where's the Lawyer?	24
Represent Yourself for Certain Transactions	25
Interacting with Financial Entities	25
Same Process, Different Details	25
What You Don't Say Can't Hurt You	26
Saying Goodbye	28
Who Was That You Talked With?	28
Recording Calls	29

Fc	orecasting Your Own Best Interest	30
A	dvance Planning to Speed Estate Settlement	30
	Payout Designations	31
	Surprise! When the Financial Power of Attorney Ends	32
	Wills	32
	Trusts	33
Es	tate Settlement Documentation Management	33
	Authentication: Numbers and Documents	33
	Finding Documents	34
	Safe Deposit Box Catch-22	34
	Original Documents versus Copies	35
	How Many Original or Certified Documents to Obtain	35
	Reclaiming Documents	35
	Formality versus Informality	35
	Storing Documents	36
Y	our Document Stash	36
	Absolutely Essential Documents	36
	Other Essential Authentication Documents	37
	Death Documents	37
	Divide and Protect Your Original/Certified Document Stash	39
	Life Documents	39
	Obtaining Medical Records	40
	Physically Maintaining Certain Records	40
	Entities' Forms	41
	Signature Verification	41
Re	esources for Effective Estate Settlement	41
	Equipment and Resources	42
М	anage Asset Delivery Methods	43
	Managing Outbound Delivery	43
	Managing Inbound Delivery	44
A	sset Types	44
	Quick Asset Transactions	44
	Slow Asset Transactions	46

How to Efficiently Settle the Family Estate	i
Getting Your Money	40
Options for Transferring Money	46
Obtaining Quick Assets at the Bank	48
Obtaining Slow Assets: Insurance, IRAs, Utilities, Etc.	51
Special Estate Bank Accounts	54
Receiving Checks: In Whose Name?	55
Obtaining and Disposing of Personal Property	5 <i>6</i>
Begin Every Task ASAP	56
Furniture	56
Personal Property	57
Vehicles	58
Government Property	59
Transferring Title to Real Property	59
Artwork, Collectibles, Jewelry	61
Estate Sales	61
Scams and Victimization	61
Tax Ramifications	62
Filing the Deceased's Last Tax Return: Medical Records	63
The Mail	6 4
Remember to Pay Yourself	65
So Now You've Got the Loot	65
The Options Are Yours	66
Index	6

FOR THOSE WHO VALUE THEIR TIME

MANY WEEKS OR MONTHS. Expect to spend many multihour sessions on the telephone, creating and managing a filing system, and running what amounts to a mini copy shop and courier enterprise. The skills required are the same as those you honed if you acted as a personal representative to your loved one during hospitalizations equanimity and fearless (and endless) questioning.

Unless you have the luxury of traveling between your home and your loved one's, and letting parts of the estate sit until the loss of your loved one is not so fresh, you may need to periodically set your grieving aside by compartmentalizing your feelings as you work on preliminary estate settlement tasks.

If you're trying to close your loved one's home and it's half a continent from your own, you've got even more work to do -- perhaps quickly. Even so, what you do at your loved one's home before returning to your own represents only the first phase of what settling an estate may require.

As with hospitalization, there are no dress rehearsals. Expect no forecasting of vital information to help you make decisions in your best interest. Rather, expect to have to unearth various possible options when conducting each bit of business.

Dans

INDEX

A	В
ACH (Automatic Clearing House), 44 ,	Banks
46, 48	accounts as quick assets, 44-45,
Advance planning, 30–33	48-50
Advisors, professional, 24–25	bank statements, deceased's, 37,
Assets, 46-55	39, 41
acting while loved one is still alive, 25, 32	keeping loved one's accounts open 45, 50
delivery methods, 43-44, 46-48	latest account statement, 41
inbound delivery, 44, 46–48	obtaining assets at, 48–50
outbound delivery, 43–44	payable on death (POD), 49–50
trackable methods, 43, 47	payout designations, 31
money	signatory to accounts, 31, 49, 50
checks, name of payee, 53, 55	signature verification, 41
delivery methods, 44, 46–48	special estate accounts, 54–55
obtaining at the bank, 48–50	See also Financial entities
negative and positive, 44	Beneficiary designation
options for use of, 64–65	IRA, 33
payout designations, 31	payout, 31
quick assets, 23, 44–45	safe deposit box, 34
obtaining, 48–50	trust, 36
slow assets, 23, 45-46	Beneficiary IRA, 52
obtaining, 50–54	Birth certificate, deceased's, 36, 39
trusts, 33	Birth date, deceased's, 34
types of, 44–46	Burial plots, See Real Estate
See also Banks; Financial entities;	
specific assets	_
Assumptions in this book, 20-22	C
Authentication, 22, 33–34, 36–37	Cars. See Vehicles
duplicates of authentication pack-	Certified copies, 35, 36, 38, 42
ages, 44	Certified mail, 43
formality versus informality in, 35	Change of address, 63
Author (Bart Windrum), Notes From	Checks, name of payee, 53, 55
the Waiting Room, 20, 30	Computer, 29, 42
Automatic Clearing House (ACH), 44 ,	Courier companies, 43, 47
46, 48	Credit cards, 39, 45
	Credit union, financial planning
	benefits, 24

reclaiming, 35

D	safe deposit box catch-22, 34
Death certificates, 37-38, 42	shipping, trackable delivery for, 36
number needed, 38	signature verification, 41
originals vs. copies, 35, 36, 38	storage of, 36
power of attorney and, 32	trust documents, 33, 36, 37, 38
time required to obtain, 32	Do Not Contact list, 63-64
Death documents, 37-38, 42	Driver's license, deceased's, 39
Death watch, estate settlement	Durable power of attorney. See
during, 25	Power of attorney (POA)
Deceased Do Not Contact list, 63-64	
Definitions, 22–23	
Delivery of assets. See Assets,	E
delivery methods	Electronic funds transfer, 46 , $47-48$
Digital camera, 42	Entity/entities, 22, 25-29
Digital voice recorder, 29, 42	forms of, 40
Direct deposit, 44	See also Financial entities
Direct Marketing Association's	Equipment for estate settlement,
Deceased Do Not Contact list,	41–42
63-64	Estate, 22
Disclaimer, author's, 23-24	estate settlement overview, 19–20
Distance between your home and	executor of, 23
your loved one's, xii, 25, 56	Estate bank accounts, 54-55
Documents, 30-41	Estate sales, 61
absolutely essential, 36	Estate taxes, 21–22
authentication, 33–34, 35, 36–37	Executor, 23
certified copies, 35, 36, 38, 42	
certified will, 36	_
death certificates, 36, 37–38	F
death documents, 37–38	Final tax return, deceased's, 62–63
divide and protect, 38–39	Financial advance planning, 30–33
document stash, 36–41	payout designations, 31
entities' forms, 40	Financial advisors, finding, 24
finding documents, 34	Financial entities, 22, 25–30
how long to keep, 37	agent's name and identification
last will and testament, 21, 32, 38	number, 28–29
life documents, 36–37, 39	forecasting your own best interest
management of, 33–36	with, 30
resources and equipment for,	initial call, purpose of, 26, 27
41–43	recording of calls to, 29
medical records, 30, 37, 39–40	records/documentation of calls,
number needed, 35, 38	28–29
originals versus copies, 35, 37, 39	talking with, 25–29
physically maintaining, 40	Point of Very Politeness, 28
Power Documents, 30–33	saying goodbye, 28

talking in the abstract, 26–27

what you don't say, 25–27	L
uniqueness of, 25	Land. See Real property/real estate
See also Banks	Last will and testament, 32, 38
Financial Power Documents, 23	Lawyer, 31, 42, 61
Financial power of attorney (POA),	representing yourself, 25
30, 31–32, 48–49	size and location of law firm, 24
First-class mail. See Mail	your loved one's, 24, 61
Forecasting, 23, 30	Liabilities of the estate, 22
Funds. See Money	Life documents, 36-37, 39, 42
Furniture, 56	Loan papers, deceased's, 39
	Loss/grief, mentally setting aside,
	xii, 19
G	
Getting your money. See Assets;	
Money	М
Government property, 59	Mail, 64
Grief, setting aside, xii, 19	certified, 43
	change of address for deceased, 63
	Deceased Do Not Contact list,
H	63-64
Hospitalization, managing. See	first class, as money delivery
Notes from the Waiting Room	method, 46–47
House. See Real property/real estate	tracking options, 43
Household goods, 45	Medical expenses, deductible,
	63-64
	Medical mileage, 62
I	Medical power of attorney, 30, 37,
Identity, authentication of, 22, 33-34	40
Individual retirement accounts. See	Medical records, 30, 37, 39–40 deceased's final tax return and,
IRAs	62–63
Insurance policies, 37, 39, 42	medical power of attorney and, 37,
payments and refunds, 51	40
payout designations, 31	Medicare property, 59
IRAs (individual retirement	Memberships, deceased's, 54
accounts), 51–52	Military
beneficiary designation, 33	honorable discharge from, 37
Beneficiary IRA, 52	service records, 37, 39
payout designation, 31	Money
rollovers, 33, 51–52	delivery/transfer methods, 46–48
Roth IRAs, 52	Automatic Clearing House (ACH),
as slow assets, 46	44, 46, 48
tax on, 61	courier, 47
,	direct deposit, 44
	first-class mail 44 46-47

wire transfer, 47	Power documents, 23, 30–33
name of payee on checks, 53, 55	Power of attorney (POA), 30
obtaining, 46–55	death of loved one and, 31–32,
options for using, 64–65	48-49
payable on death (POD), 49–50	financial, 31–32, 48–49
pay yourself, 64	medical, 30, 37, 40
special estate bank accounts,	obtaining assets and, 48–49
54–55	obtaining medical records and, 37, 40
See also Assets; Banks Money market funds, 44	Prescription drugs, deductible
Money market runus, 44	expenses, 39, 62–63
	Probate, 21, 32
N	Professional advisors, 24–25
Notarization, 32, 41	Property. See Personal property;
Notes from the Waiting Room	Real property/real estate
(Windrum), 20, 30	Property tax, 60
•	• •
0	Q
Office supplies, 42	Question asking, 25, 30, 31
Options for use of money/assets,	Quick assets, 23, 44–45, 48–50
64–65	Quien 20000, 2 0, 11 10, 10 00
Original documents versus copies,	
35, 37, 39	R
	Real estate partnerships, 52-53
_	Real property/real estate, 39, 60-61
P	adverse possession and eminient
Payable on death (POD), $49-50$	domain, 61
Paying yourself, 64-65	burial plots, 61
Payout designations, 31	gotchas, 61
Personal property, 56–60	Receipts, deceased's, 37, 39, 40
artwork, collectibles, 61	Recording calls with entities, 29
donating to charities, 57	Records, 42
furniture, 56	conversations with financial enti-
government property, 59	ties, 28–29
household goods, 45	life/financial, 36–37, 39, 42
jewelry, 61	medical, 39–40, 62–63
obtaining and disposing of, 56–60	physically maintaining, 40
real property, 59–60	resources for recordkeeping, 41–43
returning recently purchased	Rent, 45
property, 57–58 vehicles, 25, 58–59	Representing yourself, 25
Personal representative, 30	Resources for estate settlement,
Photo ID, 41	41–43 Retirement funds, obtaining, 51–52
POA. See Power of attorney (POA)	See also IRAs
Politoness Doint of Name 29	SEC MISO TIVAS

Politeness, Point of Very, 28

Retirement portfolio unknowns,	deceased's final, 62-63
52-54	deceased's prior returns, 37, 39
Roth IRAs, 52	Time/timing
	acting while loved one is still alive,
_	25, 32
S	author's thoughts on , xii-xiii
Safe deposit box	begin tasks ASAP, 25, 56
catch-22, 34	compensation for/paying yourself,
as quick asset, 44	64
signatory to, 34	contacting the tax advisor, 50
yours, 42	Title
Scams and victimization, 61-62	to real property, 39, 59–60
Settler. See Executor	to vehicles, 25, 39, 58
Shipping , 36, 43	Trackable delivery methods
Shredder, 42	for assets, 43, 47
Signatory	for documents, 36
to bank accounts, 31, 49, 50	Trusts, 33
to safe deposit box, 34	documents, 36, 37, 38
Signature verification, 41	
Skills and stamina, 20	
Slow assets, 23, 45–46, 50–54	U
Social security number, deceased's,	US Post Office. See Mail
34, 39	Utilities, 45, 54
State law	
Nolo Wills and, 32	
payout designations and, 31	V
Storage	VA cemetaries, 37
of documents, 36	Vehicles, 58-59
equipment/supplies for, 42	avoiding scams when selling,
Subscriptions, deceased's, 54	60-61
	title/title transfer, 25, 39, 58
т	Veterans, military service discharge,
Tape recorders, 29	37
Tax ramifications, 50, 62–63	Voice recorder, 29, 42
deceased's final tax return, 62–63	
deductible medical expenses,	W
62–63	
estate taxes, 21–22	Wills, 32, 38
insurance payouts as tax-free, 51	lack of, probate as result of, 21, 32 Nolo <i>Willmaker</i> software, 32
property tax, 60	
tax audits, storing documentation	Windrum, Bart, Notes from the
for, 36	Waiting Room, 20, 30 Wire transfer, 47
tax bracket, 21, 52, 61–62	TTILE CIGNISIES, T/
· · · · · · · · · · · · · · · · · · ·	

Tax returns