

Estate Gift Distribution Checklist

Estate Name:

Date Filed:

Personal Representative or Trustee:

Name:

Address:

Phone:

Attorney:

Bequest: **Specific** or **Residual** (_____% of residue)

Bequest Language/Purpose:

Notes & Important Dates			
Date Notice Received:			
End of Creditor Claims Period (4 months):			
Tax Returns Filed (9 mo):		Extension?	
Ongoing Process			
	Yes	No	<i>Comments</i>
Have you received a copy of the will?	<input type="checkbox"/>	<input type="checkbox"/>	
Sent letter to Attorney with charity's info and contact person?	<input type="checkbox"/>	<input type="checkbox"/>	<i>Do immediately upon receiving Notice of gift</i>
Are you able to carry out purpose of the bequest?	<input type="checkbox"/>	<input type="checkbox"/>	<i>If "no", contact attorney and PR and discuss possible options.</i>

If residual gift, have you requested a copy of the inventory (after 3 months have passed from PR appointment)?	<input type="checkbox"/>	<input type="checkbox"/>	<i>Do so in writing</i>
If gift of real estate, have you started evaluation process?			<i>Do so immediately upon notice of gift</i>
Questions to Consider	Yes	No	Ask Attorney or PR if any complex issues
Real Estate in Estate?	<input type="checkbox"/>	<input type="checkbox"/>	<i>Appraisals done?</i>
Conflict or Contested Issues in estate?	<input type="checkbox"/>	<input type="checkbox"/>	
Property in another state/country?	<input type="checkbox"/>	<input type="checkbox"/>	<i>May need ancillary probate</i>
Businesses/Partnership interests?	<input type="checkbox"/>	<input type="checkbox"/>	<i>Valuations are important</i>
Missing heirs?			
Closing Estate	Yes	No	
If residual gift, have you reviewed fees?	<input type="checkbox"/>	<input type="checkbox"/>	<i>If seem high, has PR tracked time? Consider average hourly rate for PR in their normal job</i>
Proper person in organization signed receipt?	<input type="checkbox"/>	<input type="checkbox"/>	
Stewardship (after gift)			
	Yes	No	<i>Comments</i>
Have you sent a thank-you letter to appropriate family member or friend?	<input type="checkbox"/>	<input type="checkbox"/>	<i>PR can tell you who is best person to receive stewardship</i>
Have you shared intended use of gift with aforementioned person?	<input type="checkbox"/>	<input type="checkbox"/>	
If endowed fund or ongoing project, have you ensured annual reporting to estate contact?	<input type="checkbox"/>	<input type="checkbox"/>	