

# After Death Overview

## THE “STEPS” OF TRUST ADMINISTRATION

- ACCEPTANCE OF TRUST (SS-4 and Form 56 to IRS)
- COPY OF TRUST AND AMENDMENTS TO BENEFICIARIES
- PREPARE INVESTMENT PLAN
- MEET WITH CPA AND ADVISORS AND PLAN FOR TAX RETURNS AND ALLOCATION OF ASSETS TO TRUSTS
- TRUST INVENTORY - Appraisal or value if necessary
- FILE DEATH CERTIFICATE TO FLORIDA DEPARTMENT OF REVENUE - Log in creditor claims
- PAY CREDITOR CLAIMS AND RECEIVE SATISFACTIONS
- FILE 706 - if necessary
- PREPARE FOR DISTRIBUTION TO BENEFICIARIES AND FINAL ACCOUNTING
- RECEIPTS FROM BENEFICIARIES AND TAX CLEARANCES
- DISTRIBUTE PER THE INHERITANCE SHIELD™

After Trustmaker's  
Death(s)  
*(in control)*

