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

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This information is general guidelines and should not be considered legal advice. If you have specific questions regarding your situation, please contact an attorney.