



Things To Do in the First 30–60 Days After a Death (Trust Edition)

A Practical Checklist for Successor Trustees

Losing a loved one is overwhelming. If you've been named as a successor trustee, you also have important legal and financial responsibilities. This checklist walks you through the key steps to take in the first 30–60 days after the settlor's passing.

*This checklist is for informational purposes only and does not constitute legal advice or create an attorney-client relationship. Consult an experienced trust attorney for assistance administering a trust.

Immediate Priorities (First 1–2 Weeks)

Obtain Certified Death Certificates

- Order **5 or more certified copies**
- You'll need these for banks, financial institutions, and asset transfers

Locate Estate Planning Documents

- Trust agreement (and any amendments)
- Pour-over will
- Powers of attorney (for reference only; they expire at death)
- Funeral or burial instructions

Arrange Funeral or Memorial Services

- Follow any written instructions left by the decedent
- Coordinate with family members



- **Secure Property and Assets**
 - Lock and secure the decedent's residence
 - Remove valuables if necessary
 - Forward mail through USPS
 - Ensure vehicles are secure

Establish Your Role as Trustee (Weeks 2–3)

- **Review the Trust Carefully**
 - Confirm your appointment as successor trustee
 - Understand your duties and distribution instructions
 - Identify beneficiaries
- **Notify Key Parties**
 - Inform beneficiaries of the settlor's death
 - Identify and notify co-trustees (if any)
- **Consult with an Attorney**
 - Get guidance on your legal duties and required notices under California law
 - Confirm whether a probate is needed for any assets not in the trust

Financial and Administrative Steps (Weeks 3–6)

- **Apply for a Tax ID Number (EIN) for the Trust**
 - Required if the trust becomes irrevocable upon death
 - Used to open accounts and file taxes
- **Open a Trust Bank Account**
 - Consolidate incoming funds (e.g., refunds, income)
 - Pay expenses from this account (not your personal funds)



- **Identify and Inventory Assets**
 - Bank and investment accounts
 - Real estate
 - Business interests
 - Personal property
 - Life insurance and retirement accounts

- **Determine Date-of-Death Values**
 - Needed for tax reporting and accounting
 - May require appraisals (especially for real estate)

Legal Notice Requirements (California-Specific)

- **Provide Required Trustee Notifications**
 - Formal notice to beneficiaries and heirs under California Probate Code
 - Includes notice of trust administration and right to request a copy
- **Track Deadlines**
 - Beneficiaries typically have **120 days** to contest after notice is given

Ongoing Responsibilities (Weeks 4–8)

- **Continue Managing Trust Assets**
 - Maintain insurance on real property
 - Monitor investments prudently
 - Handle ongoing expenses (mortgage, utilities, etc.)
- **Communicate with Beneficiaries**
 - Provide updates
 - Set expectations about timing (trust administration often takes months, not weeks)
- **Identify Debts and Expenses**
 - Credit cards, medical bills, final expenses
 - Do not distribute assets until liabilities are understood



Ongoing Responsibilities (Weeks 4–8)

- ⊘ **Do NOT Distribute Assets Too Early**
 - Wait until debts, taxes, and legal requirements are addressed
- ⊘ **Do NOT Mix Personal and Trust Funds**
 - Always use a separate trust account
- ⊘ **Do NOT Ignore Legal Notices**
 - Missing required steps can create personal liability

How Huber Law Group Helps

Acting as a trustee comes with serious legal responsibilities, but you don't have to do it alone. We help clients:

- Navigate California notice requirements
- Prepare required legal documents
- Assist with asset identification and valuation
- Coordinate with CPAs and financial advisors
- Guide you through each step to minimize risk and stress

Start with a Free Consultation

You don't have to figure everything out in the first few weeks. Focus on the essentials and stay organized. A thoughtful, methodical approach will protect both you and the beneficiaries.

Finally, get the right guidance early. Schedule a no-cost initial consultation with Huber Law Group at huberlawgroup.com.