

EXHIBIT A

GENERAL MATTERS TO ADDRESS PRIOR TO PROBATE

1. NOTIFICATIONS - notify of death and cancel any mailings or appointments

- Landlord _____
- Neighbors _____
- Homeowners Association _____
- Employer _____
- School _____
- Church (check for unmet pledges) _____
- Physicians _____
- Dentist _____

- Civic Organizations _____

* Check Decedent's calendar for additional persons or organizations

2. PETS - make care arrangements, after checking with veterinarian

- _____
- _____

3. VEHICLES - secure keys and arrange for proper storage

- _____
- _____

4. HOME MAINTENANCE

A. Security:

- Retrieve all keys and/or rekey
- Retrieve all garage door openers
- Confirm doors and windows are properly locked
- Confirm alarm system is properly set and working
- Notify alarm company of change in contact numbers for system alerts
- Confirm home safe is intact and properly set
- Confirm outside lights properly working

B. Heating/Cooling System:

- Check thermostat settings for appropriate temperature and humidity
- Confirm HVAC filters are clean and units are properly working
- Close vents for unused rooms

C. Lawn care:

- Continue or discontinue lawn service _____

- Check sprinkler system and outside faucets
- Check for dead or overhanging limbs

D. Appliances:

- Unplug or turn off unused appliances
- Check any preset timers (e.g., lamps, coffee pot, alarm clock)
- Check for frayed cords or fire hazards

5. **UTILITIES** - turn off or adjust settings:
- Electric _____
 - Gas _____
 - Water _____
 - Sewer/Septic _____
6. **COMMUNICATIONS/MEDIA**
- Mail - forward or place on hold
 - Subscriptions - cancel and request refunds for pre-paid costs for:
 - Newspapers _____
 - Magazines _____
 - Book club _____
 - Remove name from mailing lists: www.dmachoice.org, www.directmail.com, www.abacusoptout.com, www.privacyrights.org
7. **MEDICATIONS**
- Safely dispose of unused prescription medications
 - Notify pharmacy to cancel automatic refills
8. **ITEMS ON LOAN/RENTAL** - return to owner and request return of any deposit:
- Medical equipment (e.g., walker, toilet chair, etc.) _____
 - Household equipment (e.g., water filter, rug cleaner, etc.) _____
 - Library books _____
 - DVD's, audio books _____
 - Other _____
9. **DELIVERIES** - cancel scheduled deliveries and request refunds for any pre-paid costs:
- Groceries
 - Bottled water
 - Pharmacy
 - Other _____
10. **PICKUPS** - cancel pickup and request refund for any pre-paid costs:
- Trash/recycling
 - Dry cleaners/laundry
11. **MEMBERSHIPS** - cancel and request refund of pre-paid dues or deposits:
- Fitness center _____
 - County Club _____
 - Alumni organization _____
 - Political party _____
 - Other _____
 - Other _____

12. FUTURE EVENTS AND ACTIVITIES - cancel reservation and request refund of pre-paid costs:

- Sporting events _____
 - Musical/Theater performances _____

 - Travel plans _____

 - Conferences/reunions _____
 - Lessons _____
 - Other _____
- * Check Decedent's calendar and account statements for additional events and activities

13. MISCELLANEOUS

- _____
- _____
- _____
- _____

EXHIBIT B

MATTERS AFFECTING THE ESTATE PRIOR TO PROBATE

DECEDENT'S PERSONAL ASSETS

1. DECEDENT'S PERSONAL BELONGINGS - locate and secure:

- Wallet, purse, briefcase - check for cash, debit/charge cards, checkbook and Social Security card
- Cell phone
- Computer
- Digital device(s)
- Calendar, agenda, etc.
- Jewelry
- Collectibles (e.g., art, coins, guns, etc.)

2. DECEDENT'S RECORDS AND PAPERS

A. Locations to search:

- House _____
- Desk _____
- File Cabinet _____
- Closet _____
- Garage _____
- Other _____
- Office _____
- Storage Unit _____
- Safe Deposit Box _____

B. Items to locate:

- Income tax returns _____
- Real property deeds, purchase documents and tax statements _____
- Account agreements and statements _____
- Loan documents _____
- Titles and purchase records for vehicles boats trailers mobile home motorcycle
- Lease agreements _____
- Insurance records - life health property automobile _____
- Stock certificates _____
- Bonds _____
- Annuity contracts _____
- Governmental benefits statements (Social Security, Medicare, etc.) _____
- Pension records _____
- Military records _____

- Legal records (lawsuits, divorce, adoption, etc.) _____
- Employment records _____
- Other _____

3. DECEDENT'S DATA STORAGE - search these to locate and identify Decedent's assets and obligations:

- Files/papers _____
- Computer _____
- Digital device _____
- Calendar/agenda _____

- Account records _____

- Voice mail _____
- Safe/deposit box _____

DECEDENT'S FINANCIAL ASSETS

1. BANK ACCOUNTS - notify institution of death and request records; locate Decedent's account register:

A. Institution: _____

Contact: _____

Account No. _____ Payable on death to: _____

Signature card Print-out of accounts (depository and loans)

Account statements (last 6 months) Confirm automatic deposits/withdrawals

Date of death balance - principal _____ accrued interest _____

Notes _____

B. Institution: _____

Contact: _____

Account No. _____ Payable on death to: _____

Signature card Print-out of accounts (depository and loans)

Account statements (last 6 months) Confirm automatic deposits/withdrawals

Date of death balance - principal _____ accrued interest _____

Notes _____

C. Institution: _____

Contact: _____

Account No. _____ Payable on death to: _____

Signature card Print-out of accounts (depository and loans)

Account statements (last 6 months) Confirm automatic deposits/withdrawals

Date of death balance - principal _____ accrued interest _____

Notes _____

2. BROKERAGE ACCOUNTS - notify institution of death and obtain records:

A. Institution: _____

Contact: _____

Account No. _____ Payable on death to: _____

Signature card/account application Print-out of accounts

Account statements (last 6 months) Confirm automatic deposits/withdrawals

Date of death balance - principal _____ accrued interest _____

B. Institution: _____

Contact: _____

Account No. _____ Payable on death to: _____

Signature card/account application Print-out of accounts

Account statements (last 6 months) Confirm automatic deposits/withdrawals

Date of death balance - principal _____ accrued interest _____

3. ANNUITY CONTRACTS - notify company of death and request claim forms:

Company _____ Policy No. _____
Contact name/number _____
Notes _____

Company _____ Policy No. _____
Contact name/number _____
Notes _____

4. LIFE INSURANCE - notify company of death and request claim forms:

Company _____ Policy No. _____
Contact name/number _____
Notes _____

Company _____ Policy No. _____
Contact name/number _____
Notes _____

Company _____ Policy No. _____
Contact name/number _____
Notes _____

5. PROPERTY INSURANCE - notify of death, verify coverage, request account records

A. House - notify of any potential vacancy of house

Agent: _____

Policy No. _____ Coverage effective through: _____

- Declaration page
- Account statement

B. Vehicle - notify of any change in location of vehicle(s)

Agent: _____

Policy No. _____ Coverage effective through: _____

- Declaration page
- Account statement

C. Property/Casualty - notify of any change in location of covered item(s)

Agent: _____

Policy No. _____ Coverage effective through: _____

- Declaration page
- Account statement

6. OIL AND GAS ROYALTIES AND LEASES - notify distributor of death; consider requesting suspense of payment pending probate:

Company _____ Account No. _____
Unit No./Well No. _____ Date of Lease _____
Contact name/number _____

- Company _____ Account No. _____
Unit No./Well No. _____ Date of Lease _____
Contact name/number _____

7. CLAIMS OWED TO DECEDENT - notify debtor of death; give instructions for payments prior to death:

- Debtor name/number _____
Type/status of debt: _____

- Debtor name/number _____
Type/status of debt: _____

DECEDENT'S FINANCIAL OBLIGATIONS

1. CREDIT BUREAUS - notify of death, request copy of decedent's credit report:

- Experian (www.experian.com) _____
- Equifax (www.equifax.com) _____
- TransUnion (www.transunion.com) _____
- Other _____

2. MORTGAGE LOAN - notify of death; confirm payment terms; inquire about purchase money insurance:

- Company _____ Account No. _____
Contact name/number _____

Notes _____

3. CREDIT CARDS - notify of death; request statements for last 6 months; ask about credit life insurance:

- Company _____ Account No. _____
Contact name/number _____
Notes _____

- Company _____ Account No. _____
Contact name/number _____
Notes _____

- Company _____ Account No. _____
Contact name/number _____
Notes _____

- Company _____ Account No. _____
Contact name/number _____
Notes _____

4. GENERAL DEBTS OWED BY DECEDENT - notify creditor of death; request payment terms and amount:

- Creditor name/number _____
Type/status of debt: _____

- Creditor name/number _____
Type/status of debt: _____

5. CONTRACTUAL OBLIGATIONS OF DECEDENT - notify contract holder of death; confirm status of contract:

- Contract holder name/number _____
Type/status of obligation: _____

- Contract holder name/number _____
Type/status of obligation: _____

6. JUDGMENT OBLIGATIONS OF DECEDENT - confirm Decedent's obligations under judgment:

Judgment terms _____
Obligee: _____ Amount due: _____

DECEDENT'S MISCELLANEOUS FINANCIAL AFFAIRS

1. COMPUTER

- Websites (owned or controlled by Decedent) - confirm and/or arrange for interim management
- Accounts - locate password, print out statement or content, terminate account:
 - Social media (e.g., Facebook, Twitter) _____
 - E-mail _____
 - Paypal _____
 - Merchants (e.g., Amazon, eBay, etc.) _____
 - Banks _____
- Internet service - consider terminating service, request refund of pre-paid costs

2. EMPLOYEE BENEFITS - contact Decedent's employer and confirm status of accrued/unpaid benefits:

- Salary (including unused vacation pay, sick leave or PTO) _____
- Medical savings plan _____
- Life insurance _____
- Accidental death/dismemberment insurance _____
- Pension/retirement plan _____

3. UTILITIES - notify of death; consider turning off service and/or changing billing address:

- Electric _____
- Gas _____
- Water _____
- Sewer/Septic _____
- Phone (land line) _____
- Phone (cell) _____
- Cable/Satellite _____

4. INCOME TAX RETURNS

- Contact Decedent's accountant and check whether any filing or tax is due and owing
- Consider paying any amounts owed, to stop accrual of penalties and interest

5. MILITARY BENEFITS

- Contact Veteran's Administration and determine nature and value of any available benefits

6. UNCLAIMED PROPERTY

- Contact Texas State Comptroller's Office to determine whether Estate is entitled to funds (www.window.state.tx.us/up/reclaiming.html)

7. TUITION REFUNDS

- Contact any school or training institute to cancel Decedent's enrollment; request refund for portion of unused tuition; request whether tuition-guarantee provision was in place.

8. ITEMS ON ORDER

- Check with any retail, wholesale or mail-order outlets for orders placed by Decedent and make arrangements for payment or refund.

9. INTELLECTUAL PROPERTY RIGHTS

- Check applicable registries for trademarks, patents, copyrights or other intellectual property, to determine whether any renewals or modifications must be filed.