Estate Planning
Readiness Checklist

I have:

___ A current revocable trust
___ Identified someone who will handle my estate
___ Reviewed my mortgage and my other debts
___ Identified who should receive my home
___ Reviewed all beneficiaries on all of my accounts
___ A current durable power of attorney
___ A current health care directive
___ Important documents stored where my family can find them
___ Someone knows where my documents are located

My important contact information:

The name of my ROC Co-op community: _____

My lot rent is: _____ a month and is sent here: _____

My mortgage lender is: _____

My attorney is: _____

The person to contact if I die: _____

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Compassion & Compliance

A Board's Guide to Navigating the Passing of a Homeowner.



DO

- Express condolences
- Identify the appropriate family/estate contact
- Make sure your PM communicates re: rent
- Document the communication
- Follow your ROC's policies and procedures
- Consult your attorney when necessary
- Communicate appropriately with the mortgage lender
- Maintain accurate contact information about homeowners and their next of kin

DON'T

- Just assume someone is the legal owner
- Accept: "Mom told me I'm in charge" as proof of ownership
- Give legal advice
- Allow someone to sell or transfer the deed without proper documentation
- Ignore unpaid site rent while waiting for the estate to be resolved

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