

Probate -- There Are Things You Can Do!

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This past August, after writing the article "Assembling Family Documents for Peace of Mind," I received over 100 requests from 34 states and the District of Columbia for the checklist. This seemingly universal interest prompted me to look for other useful items I could share with readers.

Author Linda Cain and estate planning attorney Betsy Wolf have collaborated on a useful booklet called *How to Survive a Death in the Family: A Guide to Probating an Estate*.¹ I recently located a handout from this publication distributed at a National Council on Aging conference titled "Estate Administration Time Lines and Deadlines." One of the things Ms. Wolf said really stuck in my mind: after a death, a spouse or other family member needs something to do.

I'd like to share a story of a former patient of mine who had long been a caregiver for his ailing wife. About 10 years ago, soon after his wife died of cancer, this handsome, normally healthy man, who had never been sick, began to experience debilitating headaches and insomnia. His daughter, whom I had never met but who knew my parents, convinced him to come in for an appointment. I conducted a thorough examination and could find nothing physically wrong with him. Honest, he was the picture of health! It was obvious however, that the light had gone out of his life. It occurred to me that I ought to tell him that I thought the headaches were due to the recent loss of his wife, and I suggested a challenging exercise program.

This served two purposes. First, as I acknowledged his loss, he was able to acknowledge it as well; second, the exercise was something I felt would do him a world of good physically and mentally; and most importantly, it gave him something to do! I saw him several times afterwards, and each time I did nothing but update his exercise routine and encourage him to continue. I only saw him as a patient for a short time but often caught glimpses of him walking around the park.

A year ago, at my parent's 50th wedding anniversary, this healthy-as-a-horse gentleman attended the event and introduced me to his daughter and son-in-law. Aside, his daughter expressed her thanks for what I had done for him. I shared that I had done nothing except give him some exercises ... purpose, routine, encouragement ...

This booklet written by Ms. Wolf gives a spouse or other family member something to do during a time of crisis. As an example, instructions are provided for administering estate duties, such as within one week of date of death:

- Arrange for funeral/burial/cremation;
- Contact social security administration;
- Contact veteran's administration (if applicable);
- Request certified copies of death certificate;
- File life insurance claim;
- Contact former employer regarding benefits.

Other timelines with designated tasks include those within 2-3 weeks of the date of death; within 6-8 weeks; within 2-3 months; within one year; and within 12-13 months of the date of death. The

booklet is written in language that is easy to understand; a step-by-step assistance through the probate process is provided using a detailed, chronological sequence. Sample worksheets are included. This valuable information could be useful to your patients as well.

If you are interested in receiving a one-page copy of Estate Administration Time Lines and Deadlines, send me a self-addressed stamped envelope and I will mail you a copy. If you would like to order the booklet, send your name and address and a check for \$10.00 to:

Beehive Communications, Inc.
11 Pleasant St.
PO Box 418
Medfield, MA 02052

As always, I welcome your letters, comments and questions.

Reference

1. Cain, L. & Wolf, B. How to Survive a Death in the Family: A Guide to Probating an Estate. Medfield, MA: Beehive Communications, Inc., 1991.

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