KATHLEEN M. VITALE

Thank you for your interest in my services. I provide services for Estate administration for the District of Columbia and for Maryland counties.

The following is a partial list of the various tasks which can be performed under attorney supervision:

Probate

-- be present at initial meeting with client to ascertain information needed for case and to provide guidance if requested

-- review all client records, including bank and security account records, to determine the nature and ownership of decedent's assets

-- assist with valuation of all bank and security assets as of decedent's date of death

-- assist with marshaling of all estate assets, including opening and transferring all decedent's accounts to estate accounts

-- assist with closing of decedent's home or apartment, including arranging for packing and storing of items, sale at auction or to others, termination of all utilities and leaseholds.

-- assist with the sale of the decedent's home, including preparation of all requisite court documents for review by counsel and working with brokers and other agents as necessary

-- assist with closure of decedent's accounts with brokerage houses, credit cards, etc. Determine outstanding liabilities and assist with satisfaction of same from estate funds as allowed

-- review decedent's incoming mail and assist with items as required

-- review all death benefits available to decedent's beneficiaries or estate, including assistance with processing of claim forms with insurance companies, and federal and state agencies

-- prepare all initial court documents, including Petition for Probate, Consent and Waivers, Nominal or General Bond, Renunciation, Verification and Certificate, etc. for review by counsel.

-- file documents with Register of Wills including conference with Deputy Register, arrange bonding with local surety, and arrange publication. **Services can include e-filing in the DC Probate Division.**

-- file Affidavits of Publication and/or List of Interested Persons

-- prepare and file documentation for qualification of foreign personal representative, including arranging for publication requirements

-- arrange for and assist at appraisals of real and personal property, as required

-- prepare and file Waiver of Filing Inventories and Accounts, if applicable, for review by counsel

-- prepare and file all estate Accounts, including preparation of all backup documentation and assistance with Account audit process

-- prepare correspondence to clients for counsel review and signature regarding status of matter. Correspondence to other parties can also be prepared for review by counsel

-- assist with all aspects of small estate proceedings including accompanying client to Register of Wills, if desired

Tax Although we do not prepare tax returns, we can assist with the following:

-- prepare Application for Employer Identification Number and obtain EIN through IRS.

-- assemble financial data for CPA, coordinate preparation of and file U.S. and state Estate Tax Return, if such return is required, including obtaining and assembling all requisite attachments

-- assemble financial data for CPA, coordinate preparation of and file U.S. and local jurisdiction Fiduciary Income Tax Returns, including obtaining and assembling all requisite attachments

-- assemble financial data for CPA, coordinate preparation of and file decedent's final U.S. and local jurisdiction Individual Income Tax Returns, including obtaining and assembling all requisite attachments