

# Estate of Margaret Chen

Evidence-backed Estate Packet · Margaret Chen · Generated 4/11/2026

## Estate Summary

Ledger entries	12
Inflow	\$28500.00
Outflow	\$11245.00
Distributions	\$6500.00
Net position	\$10755.00

Supporting documents: 7 · Audit events: 3

Exhibit links in this packet are tied to a secure review package and can be revoked or allowed to expire.

## Reviewer Summary

This sample packet shows the kind of clean handoff another person can review quickly

The ledger, proof, and reviewer context live together so the final packet does not depend on memory or a last-minute spreadsheet cleanup project.

### What looks supported now

- 12 ledger entries are included in this sample packet.
- 7 supporting files are linked across the record.
- Most major expenses already include proof and reviewer context.
- Category totals and distributions are summarized before the raw ledger detail.

### What may still draw questions

- 2 transactions still need supporting proof before a reviewer is likely to feel fully comfortable.
- 2 transactions still need reviewer explanation for the cleaner handoff this product aims to create.

## Categorized Totals

Estate account deposits (2)	\$28500.00
Property costs (3)	\$4380.00
Funeral expenses (2)	\$3125.00
Legal fees (2)	\$2240.00
Reimbursements (1)	\$1500.00
Distributions (2)	\$6500.00

# Transaction Ledger

Date	Title	Category	Files	Amount
1/8/2026	<b>Life insurance deposit</b> Insurance proceeds deposited to the estate bank account after claim approval. Exhibits: Exhibit 01	Estate account deposits	1	\$24500.00
1/16/2026	<b>Bank balance transfer</b> Closing balance transferred from the decedent's personal checking account after death certificate review. Exhibits: Exhibit 02	Estate account deposits	1	\$4000.00
1/18/2026	<b>Funeral home invoice</b> Paid directly from the estate account for services and burial fees. Exhibits: Exhibit 03	Funeral expenses	1	\$2485.00
1/19/2026	<b>Flowers and obituary notice</b>	Funeral expenses	0	\$640.00
1/22/2026	<b>Property insurance premium</b> Coverage kept active while the home remained listed for sale. Exhibits: Exhibit 04	Property costs	1	\$1260.00
1/28/2026	<b>Utility payments</b> Gas, water, and electric kept active until personal property was cleared out.	Property costs	0	\$920.00
2/3/2026	<b>Emergency plumbing repair</b> Repair completed to prevent water damage before listing the property. Exhibits: Exhibit 05	Property costs	1	\$2200.00
2/5/2026	<b>Probate filing fee</b> County probate filing fee paid at the initial petition hearing. Exhibits: Exhibit 06	Legal fees	1	\$740.00
2/7/2026	<b>Attorney retainer</b>	Legal fees	0	\$1500.00
2/10/2026	<b>Executor reimbursement for lock changes</b> Executor paid locksmith directly to secure the vacant home after the funeral. Exhibits: Exhibit 07	Reimbursements	1	\$1500.00
3/1/2026	<b>Initial beneficiary distribution</b> Partial distribution to one beneficiary after reserve was kept for open property and legal expenses.	Distributions	0	\$3000.00
3/12/2026	<b>Second beneficiary distribution</b>	Distributions	0	\$3500.00

# Audit / Change Summary

Created "Funeral home invoice"

1/18/2026 · Ellen Chen

Linked attachment "funeral-invoice.pdf" to "Funeral home invoice"

1/18/2026 · Ellen Chen

Resolved missing proof warning

2/10/2026 · Ellen Chen

# Evidence Appendix

## Exhibit 01 · insurance-deposit-letter.pdf

Life insurance deposit · 1/8/2026 · \$24500.00  
application/pdf · 470.7 KB

[Open source attachment](#)

## Exhibit 02 · closing-statement.pdf

Bank balance transfer · 1/16/2026 · \$4000.00  
application/pdf · 317.4 KB

[Open source attachment](#)

## Exhibit 03 · funeral-invoice.pdf

Funeral home invoice · 1/18/2026 · \$2485.00  
application/pdf · 600.6 KB

[Open source attachment](#)

## Exhibit 04 · insurance-renewal.pdf

Property insurance premium · 1/22/2026 · \$1260.00  
application/pdf · 274.4 KB

[Open source attachment](#)

## Exhibit 05 · plumbing-repair-invoice.pdf

Emergency plumbing repair · 2/3/2026 · \$2200.00  
application/pdf · 528.3 KB

[Open source attachment](#)

## Exhibit 06 · probate-filing-receipt.pdf

Probate filing fee · 2/5/2026 · \$740.00  
application/pdf · 191.4 KB

[Open source attachment](#)

## Exhibit 07 · locksmith-receipt.svg

Executor reimbursement for lock changes · 2/10/2026 · \$1500.00  
image/svg+xml · 140.6 KB

[Open source attachment](#)