

Executor *checklist*

Someone trusted you with this. Being named executor, or personal representative, mostly means doing ordinary tasks in a sensible order and writing down what you did. This is that order.

This checklist is general information, not legal advice. Probate rules are set by each state.

ESTATE OF

EXECUTOR

CASE NUMBER

FIRST STEPS

Before probate *opens*

Until the court gives you authority, your role is mostly protective. Keep things safe and in place.

- ☐ **Locate the original will** and any codicils. Read it before anything is given away.
- ☐ **Secure the home, vehicles and mail**, and anything valuable or easy to carry off.
- ☐ **Keep homeowner and auto insurance active** on estate property.
- ☐ **Order certified death certificates** through the funeral home or vital records.
- ☐ **Contact the probate court clerk or an attorney** to learn how your state opens an estate.
- ☐ **Start a single folder or box** where every estate paper will live.

ONGOING DUTIES

The middle *months*

Once the court appoints you, the steady work begins. Never mix estate money with your own, even briefly.

- ☐ **Inventory assets and debts** as your state requires.
- ☐ **Open an estate bank account** and run all estate money through it.
- ☐ **Notify creditors** in the manner state law directs, often including a published notice.
- ☐ **Notify Social Security, insurers, banks and agencies** of the death.
- ☐ **File the final income tax return** and any estate returns that apply.
- ☐ **Keep every receipt and a running ledger** of money in, money out, and why.

FINAL STEPS

Closing the *estate*

Pay debts, taxes and valid claims before anything else. An executor who pays heirs first can end up personally responsible.

- ☐ **Distribute assets as the will directs**, and collect a signed receipt from each person.
- ☐ **Prepare the final accounting** from your ledger: what came in, what went out, and what each beneficiary received.
- ☐ **File whatever your state requires** to close the estate and release you from the role.
- ☐ **Keep the records for several years** after closing, in case questions come later.

LOOK ONCE, THOROUGHLY

The document *tracker*

Tick each one as you find it. You will not need every item, and some will not exist.

FOUND	WHERE IT IS KEPT	NOTES
☐	Original will, codicils or trust papers	
☐	Certified death certificates	
☐	Court papers appointing you	
☐	Bank and retirement statements	
☐	Life insurance policies	
☐	Deeds, mortgage and property tax	
☐	Vehicle titles and registrations	
☐	Recent income tax returns	
☐	Marriage or divorce papers	
☐	Military discharge papers	
☐	Bills, loans and credit card statements	
☐	Safe deposit keys, digital accounts list	

A PLAIN WORD ABOUT THE LAW

Ask, rather than *guess*

Probate is governed by the law of the state where they lived. The court clerk's office can tell you what filings your county expects, and a probate attorney can tell you what the law asks of you. For a modest estate, one paid hour at the start is sometimes all you need.

PEOPLE YOU WILL LEAN ON

Key *contacts*

NAME	PHONE OR EMAIL
Probate court clerk	
Attorney	
Accountant	
Estate bank	
Insurance agent	

MONEY IN, MONEY OUT, AND WHY

A simple *ledger*

One line for every payment in or out of the estate account. This is what makes the final accounting easy.

DATE	WHAT IT WAS	IN	OUT