

Executor Checklist

The core steps most executors work through - not a substitute for legal advice, since specific duties vary by state.

Getting Started

- ☐ Locate the original will and any codicils (amendments)
- ☐ Get several certified copies of the death certificate
- ☐ File the will with the probate court in the right county
- ☐ Confirm whether the estate needs to go through formal probate at all

Notifications

- ☐ Notify all beneficiaries named in the will
- ☐ Notify known creditors, as required by state law
- ☐ Notify Social Security, pension providers, and any benefit administrators
- ☐ Notify banks, credit card companies, and other financial institutions

Inventory & Assets

- ☐ Inventory all assets - real estate, accounts, vehicles, personal property
- ☐ Determine which assets pass through probate vs. outside it (jointly owned property, named beneficiaries)
- ☐ Open an estate bank account for handling estate funds
- ☐ Secure and maintain any property until it's distributed or sold

Debts & Taxes

- ☐ Pay valid debts and final bills from estate funds
- ☐ File the deceased's final personal income tax return
- ☐ File an estate tax return if the estate is large enough to require one
- ☐ Keep clear, itemized records of every payment made from the estate

Distribution & Closing

- ☐ Distribute remaining assets according to the will's instructions
- ☐ Get signed receipts from beneficiaries confirming what they received
- ☐ File a final accounting with the probate court, if required
- ☐ Close the estate formally once all steps are complete