



Executor Checklist

It is an honor to be named someone's executor. The writer of the will trusts you to take on the extensive and time-consuming task of settling their estate responsibly at every step. We hope that this checklist can help you stay organized and informed throughout this important process.

IMMEDIATE TASKS

- Find keys to home & car
- Protect/manage assets until turned over to beneficiaries
- Find their Will
- Apply for an Employer Identification Number (EIN)
- Appraise assets if needed
- Arrange to publish a "notice of probate" in the local papers
- Determine if probate proceedings are needed
- If there's a living trust, work with the trustee to pay bills, manage property, etc.
- Designate guardians for minors if necessary
- Collect money owed to the estate (wages, insurance benefits, rents, etc.)
- Pay bills
- File final income tax returns
- File estate taxes if necessary
- Notify inheritors and beneficiaries
- Distribute assets

TYPICAL BUSINESSES/AGENCIES TO NOTIFY

- | | |
|--|--|
| <input type="checkbox"/> Banks | <input type="checkbox"/> Credit Card Companies |
| <input type="checkbox"/> Utility Companies | <input type="checkbox"/> Employer/Former Employers |
| <input type="checkbox"/> Post Office | <input type="checkbox"/> Insurance Companies |
| <input type="checkbox"/> Landlord/Tenants | <input type="checkbox"/> Social Security Admin. |
| <input type="checkbox"/> Pension Payers | <input type="checkbox"/> State Health/Welfare Depts. |
| <input type="checkbox"/> Doctors/Health Care Providers | <input type="checkbox"/> Use bills to notify service providers (trash collection, landscaper, Netflix, newspapers, Apple, other subscriptions) |
| <input type="checkbox"/> Veterans Affairs | |
| <input type="checkbox"/> Investment Firms | |

DOCUMENTS NEEDED

- Bank Statements
- Birth Certificates (deceased and any minor children)
- Brokerage Account Statements
- Business Co-Ownership Agreements
- Checkbooks
- Child Support Documents
- Credit Card Statements
- Disability-Related Documents
- Divorce Papers
- Health Insurance Policies, Statements or Bills
- Immigration & Citizenship Documents
- Investment Records
- Life Insurance Policies & Premium Payment Records