



# Executor Starter Checklist

## Before You Begin

- ☐ Locate the will (if there is one)
  - ☐ Confirm role as executor or personal representative
  - ☐ Obtain certified copies of death certificate
  - ☐ Secure the home and personal property of the deceased
  - ☐ Notify immediate family and dependents
  - ☐ Contact a probate attorney as early as possible to understand your responsibilities
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## First Documents to Gather

- ☐ Original will or trust
  - ☐ Certified death certificates (get several copies)
  - ☐ List of known assets and liabilities
  - ☐ Insurance policies and retirement account information
  - ☐ Recent bank, tax, mortgage statements
  - ☐ Contact information for attorney, accountant, or financial advisor
  - ☐ Schedule a consultation with an attorney to review documents and outline next steps
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## Immediate Notifications

- ☐ Ask your attorney if any notifications should be handled formally or in writing
  - ☐ Social Security Administration
  - ☐ Employer or pension providers
  - ☐ Life insurance companies
  - ☐ Banks and credit unions
  - ☐ Credit card companies
  - ☐ Post office (set up mail forwarding if needed)
  - ☐ Utility and service providers
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## Legal and Financial Steps

- ☐ Work with an attorney to navigate probate filings and court requirements
  - ☐ File the will with the probate court (if required)
  - ☐ Obtain court documents showing your authority to act (such as Letters Testamentary)
  - ☐ Open a separate estate bank account
  - ☐ Notify heirs and beneficiaries
  - ☐ Begin an inventory of estate assets and debts
  - ☐ Track all transactions, receipts, and expenses
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## Additional Tips

- ☐ Check in regularly with your probate attorney for guidance and deadlines
  - ☐ Do not combine estate money with personal funds
  - ☐ Probate may take time, so stay organized
  - ☐ Use a binder or digital folder to keep documents together
  - ☐ Consider a tax professional for final income or estate returns
  - ☐ Communicate clearly with family and beneficiaries
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“You don’t have to do everything today.  
Just take the next right step.”