

EXECUTOR'S TASK LIST

Your responsibility as Executor is to settle the estate as per the terms of the deceased's Will and according to state law. Generally, an executor's duties may include:

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| <input type="checkbox"/> Record Activities: Maintain a record of all estate settlement activities, tasks, phone calls, emails, meetings, payments, etc. |
| <input type="checkbox"/> Gather Documentation: Gather and organize estate documentation. |
| <input type="checkbox"/> Secure the Will and/or Trust: Locate the Will, Codicils and personal memorandums. Review instructions. If no Will exists or Will cannot be located, apply to Probate Court for appointment of Estate Administrator. |
| <input type="checkbox"/> Obtain Death Certificates: Secure copies as needed. |
| <input type="checkbox"/> Contact Social Security Administration: Report the deceased's passing. |
| <input type="checkbox"/> Redirect the deceased's mail |
| <input type="checkbox"/> Ensure Cash Flow: Ensure financially dependent beneficiaries' cash flow. |
| <input type="checkbox"/> Arrange Care: Arrange for the care of minor children and pets. |
| <input type="checkbox"/> Inventory the Estate: Identify and value all estate assets and liabilities. |
| <input type="checkbox"/> Schedule Meetings: Arrange meetings with the following professionals and complete associated tasks: Banker, Investment Advisor, Insurance Broker, Lawyer, Accountant |
| <input type="checkbox"/> Apply for Probate: Apply for Probate and Administration of the Estate; notify beneficiaries and distributees. |
| <input type="checkbox"/> Apply for EIN: Apply for estate identification number. |
| <input type="checkbox"/> Establish Estate Bank Account: Open account solely for purpose of estate accounting. |
| <input type="checkbox"/> Secure Property: Arrange for the residence to be emptied and cleaned, locks to be changed, alarm system installed. Protect all other real estate, assets and business interests. |
| <input type="checkbox"/> Search for Unclaimed Property: Investigate possible lost bank accounts and unclaimed property, particularly if the deceased lived in many locations during his/her lifetime. |
| <input type="checkbox"/> Apply for Benefits: Apply for benefits, pensions and final entitlements. |
| <input type="checkbox"/> Pay Debts: Pay estate debts in order of priority. |
| <input type="checkbox"/> Send Notices: Send notice of deceased's passing to appropriate individuals and organizations. |
| <input type="checkbox"/> Distribute Assets: Distribute and transfer all assets, including vehicles. Secure a property receipt for all distributions. |
| <input type="checkbox"/> File Taxes: Prepare and file all income tax returns. |
| <input type="checkbox"/> Discard Items: Dispose, donate or auction any items that were not distributed as part of the residue of the estate. |
| <input type="checkbox"/> Secure Releases: Obtain a signed release from beneficiaries, cancel any bonds, close estate bank account, discharge personal representative where applicable. |
| <input type="checkbox"/> Collect Executor's Fee: Secure compensation for administering the estate. |