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## EXECUTOR'S CHECKLIST

An Executor should follow these steps in administering an estate.

Although this list is extensive, there may be other personal tasks that are not included. Scanning this list can give you an idea of the scope and range of the Executor's duties. This listing is divided into various time periods (Immediate, first week, first month, long-term). These time periods are approximations and many of the duties may be required to be performed either before or after the exact time specified.

### **Immediate Executor Duties**

- ☐ Contact funeral home regarding services.
- ☐ Contact cemetery regarding burial or cremation
- ☐ Contact local newspaper with obituary information
- ☐ Contact relatives and close friends
- ☐ Contact employer and business associates
- ☐ Contact lawyer and accountant
- ☐ Contact guardians or trustees named in Will
- ☐ Arrange for immediate care of decedent's children and/or pets
- ☐ Arrange for living expenses for decedent's spouse
- ☐ Contact veteran's organizations when applicable
- ☐ Secure house and personal property

### **Executor Duties Within First Week**

- ☐ Petition Surrogates Court for appointment as Executor
- ☐ Contact life insurance agent and report death to make a claim. Review beneficiaries of policies that will continue in force
- ☐ Contact general insurance agent
- ☐ Contact medical and health insurance companies
- ☐ Contact union regarding pensions and death benefits

### **Executor Duties Within First Week cont'd**

- ☐ Contact military regarding pensions and death benefits
- ☐ Contact Social Security Administration
- ☐ Obtain Death Certificates
- ☐ Contact banks, savings and loans, and credit unions
- ☐ Contact mortgage companies
- ☐ Contact IRA or KEOGH account trustees
- ☐ Contact stock broker and investment counselor
- ☐ Contact post office
- ☐ Contact Department of Motor Vehicles
- ☐ Arrange for management of business or real estate holdings
- ☐ Review of all decedent's records and legal documents

### **Executor Duties Within First Month**

- ☐ Contact gas, telephone, electric, trash, and water companies
- ☐ Contact newspaper and magazine subscriptions departments
- ☐ Contact credit card companies
- ☐ Begin inventory of assets
- ☐ Arrange for appraisal of assets

### **Executor Duties Once Appointed Fiduciary by Court**

- ☐ Begin collection of assets
- ☐ Open bank accounts for estate
- ☐ Open decedent's safe deposit box

### **Long Term Executor Duties**

- ☐ Inventory all estate assets
- ☐ Collect all monies and property due to decedent
- ☐ Pay all taxes due and file both income tax and estate tax returns
- ☐ Pay all debts and expenses of decedent, including funeral expenses
- ☐ Arrange for sale of estate assets, if necessary
- ☐ Distribute all remaining assets according to Will
- ☐ Transfer title of any jointly held accounts to the surviving joint owner
- ☐ Review ownership of Savings Bonds for tax elections
- ☐ Submit final accounting and receipts to probate Court
- ☐ Close estate books and affairs.