



## Your Estate Executor Duties Checklist

**1) Obtain a copy of the Death Certificate.**



The funeral home will provide the death certificate; ask for multiple copies.

**2) Make funeral arrangements.**



Communicate with the funeral home to ensure the wishes of the deceased are carried out.

**3) File the Will in Probate Court.**



Most states require filing a copy of the Will in Probate Court.

**4) Locate the Assets and Manage Distribution**



If the deceased left a Will, contact those named and ensure they receive the designated property

**5) Communicate with appropriate allies.**



File the necessary paperwork with the deceased's credit card company, bank and mortgage company.

? Was the deceased collecting Social Security, Medicare or Veterans benefits? If so, the Social Security Administration and Department of Veterans Affairs will also need to be notified.

**6) Set up an Estate Account.**



The estate account will hold all of the financial assets owed to the deceased, including paychecks, dividend payments and tax refunds.

**7) Pay ongoing expenses and debts.**



Until the estate is settled, you'll need to continue paying the mortgage, utility bills, insurance premiums and other day-to-day expenses.

? Does the Deceased have outstanding Debt? You also need to communicate with creditors and decide how these will be settled. All debts will need to be paid before any assets can be disbursed to heirs.

**8) File a Tax Return**



An income tax return must be filed for the period from the first date of the tax year until the date of death.

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T W O **LIONS**

Joshua Allen

817.476.2266

Email: Josh@2lions.us

