

EXECUTOR CHECKLIST



PHASE ONE

- Provide court with copy of will
- Notify social security
- Cancel any unneeded services
- Take inventory of the estate
- Protect vacant home
- Confirm with insurance regarding any special rules for vacant homes

PHASE THREE (9-12 MONTHS)

- Decedent's income tax returns
- Estate income tax returns
- Inheritance tax returns (remember to reduce liability with expenses paid)

PHASE FOUR

- Resolve any remaining debt
- Finalize asset disposition plan
- Sell or dispose of unwanted assets

We will assist with many of these tasks and provide you with any additional information on the items you must complete.

Please do not hesitate to contact us with any questions or concerns.

PHASE TWO

- Forward decedent's mail to yourself
- Determine and notify heirs
- Submit paperwork to court regarding notification of heirs
- Determine family allowance if applicable
- Notify life insurance companies
- Notify creditors - publish notice of death
- Obtain EIN
- Open estate bank account
- File IRS form 56
- Begin asset disposition plan

FINAL TASKS

- Distribute assets
- Compensate executor
- Pay final attorney's fees
- Finalize probate
- Close down the estate
- File IRS form 56 one last time