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Executor Checklist: Duties After a Death

Serving as an executor is a legal responsibility. This checklist follows the usual order of tasks; the details depend on your state's probate rules.

Name: _____ Date: _____ Case/claim no.: _____

First weeks

- [ ] Order several certified copies of the death certificate
- [ ] Locate the original will and any trust documents
- [ ] Secure the home, vehicles and valuables
- [ ] Notify Social Security and other benefit payers
- [ ] Forward mail and keep paying essential bills such as insurance

Probate and appointment

- [ ] File the will and a petition with the probate court
- [ ] Get court papers appointing you (often called letters testamentary)
- [ ] Get an employer identification number (EIN) for the estate
- [ ] Open an estate bank account
- [ ] Notify heirs and beneficiaries as required

Assets and debts

- [ ] Inventory all assets and get date-of-death values
- [ ] Notify banks, insurers and retirement plan administrators
- [ ] Give notice to creditors as your state requires
- [ ] Review claims and pay valid debts from estate funds
- [ ] Do not pay heirs before debts and taxes are handled

Taxes

- [ ] File the deceased person's final income tax return
- [ ] File estate income tax returns if required
- [ ] Check whether a federal or state estate tax return is due

Closing the estate

- [ ] Prepare an accounting of money in and out
- [ ] Distribute assets to beneficiaries and get receipts
- [ ] Ask the court to close the estate and discharge you

Tips

- Never mix estate money with your own.
- Small estates may qualify for a simplified process; check your state's small estate affidavit rules.

Official resources

IRS: Filing a final federal tax return for someone who has died
https://www.irs.gov/individuals/file-the-final-income-tax-returns-of-a-deceased-person

IRS: Estate tax
https://www.irs.gov/businesses/small-businesses-self-employed/estate-tax

IRS: Gifts and inheritances
https://www.irs.gov/faqs/interest-dividends-other-types-of-income/gifts-inheritances

IRS: Get an employer identification number
https://www.irs.gov/businesses/small-businesses-self-employed/get-an-employer-identification-number

Notes