



Executor's Checklist

The following list will give you an idea of the many things you may need to do as executor.

- Locate the will
- Obtain a lawyer, if necessary
- Apply to appear before the probate court
- Notify beneficiaries named in the will
- Arrange for publication of notice to creditors and mail a notice to each known creditor
- Send notices of the person's death to the post office, utilities, banks and credit card companies
- Inventory all assets and have them appraised, if necessary
- Collect debts owed to the estate
- Check with the deceased's employer for unpaid salary, insurance and other employee benefits
- File for Social Security, civil service or veteran benefits
- File for life insurance and other benefits
- File city, state and/or federal tax returns
- File state death and federal estate tax returns
- Pay valid claims against the estate
- Distribute assets and obtain receipts from beneficiaries
- File papers to finalize the estate

This worksheet is part of "Life Advice: Taking Legal Action" at www.lifeadvice.com.