
FROM “IN CASE ANYTHING HAPPENS”

Executor of Estate Checklist

The twelve duties, in the order they happen — and the seven things not to touch yet. You don't need a plan today. You need the order.

THE TWELVE DUTIES, IN ORDER

- ☐ **1. Find the will** — the original, any trust or codicil. Read it once; don't act on it yet
- ☐ **2. Order 10 or more certified death certificates** through the funeral home
- ☐ **3. Secure the property** — home, car, mail, valuables; keep the insurance paid
- ☐ **4. Open probate** with the county court → **Letters Testamentary** (your authority to act)
- ☐ **5. Get the estate an EIN and its own bank account** — every dollar goes through it, never yours
- ☐ **6. File IRS Form 56** — tells the IRS you're the fiduciary
- ☐ **7. Notify** — Social Security 1-800-772-1213, employer/pension, insurers, banks, one credit bureau, creditors
- ☐ **8. Inventory the assets and list the debts** — values as of the date of death
- ☐ **9. Handle creditor claims from the estate** — in your state's order; ask the clerk
- ☐ **10. File the taxes** — final Form 1040; Form 1041 if the estate earns over \$600; Form 706 large estates only
- ☐ **11. Distribute** — only after debts, taxes, and expenses; get a signed receipt from each heir
- ☐ **12. Close the estate** — final accounting to the court; ask to be discharged

WHAT NOT TO TOUCH YET

- ☐ Don't hand anything out · don't mix estate money with your own
- ☐ Don't pay debts in the order collectors call · don't sell the house or car before the Letters
- ☐ Don't cancel their phone or close their email · don't throw away mail or papers for a year
- ☐ Don't sign for the estate before the court appoints you

Organizer's list: what to gather, who to call, what to check, in order. Not legal, financial, or tax advice. Full explanations and sources: incaseanythinghappens.com/blog/executor-of-estate-checklist



The first-week call log

Phone calls, not decisions — write down every one

Ask a friend to sit with you and fill this in while you talk. Nothing is decided this week; you have no authority until the Letters issue.

WHO	DATE	SPOKE TO	WHAT THEY NEED FROM ME	DONE
Funeral home · death certificates				☐
County probate clerk				☐
Social Security · 1-800-772-1213				☐
Their employer / pension				☐
Life insurance				☐
Bank				☐
Bank				☐
Credit bureau (one)				☐
Home / auto insurer				☐
Other				☐

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The documents and the filings

Ten documents to find first · six filings, in order · put this sheet on the front

- ☐ The original will, any trust, any codicil
- ☐ Certified death certificates — 10 or more
- ☐ Their Social Security number, birth certificate, marriage certificate or divorce decree
- ☐ Deeds and titles — house, land, vehicles
- ☐ Bank and brokerage statements — most recent, every account
- ☐ Retirement accounts and pensions — with the beneficiary forms
- ☐ Life insurance policies
- ☐ The last three years of tax returns
- ☐ The debts — mortgage, loans, credit cards, medical bills
- ☐ Digital access — phone passcode, email password, any password list; DD-214 if they served

THE SIX FILINGS, IN ORDER

FILING	WITH	WHAT IT DOES	DONE
The will	County probate court	Opens the estate	☐
Letters Testamentary	Issued by the court	Your authority to act	☐
EIN application (Form SS-4)	IRS	The estate's tax number	☐
Form 56	IRS	You are the fiduciary	☐
Final Form 1040 (+1310 if refund)	IRS	Their last personal return	☐
Form 1041 (estate income > \$600) · 706 (large estates)	IRS	The estate's own taxes	☐