

First Week

This first week will likely be the hardest, but there are some important to-dos that will ensure a smooth transition for all parties involved.

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|--|-----------------------|---------------------|
| <input type="checkbox"/> Inform close friends and family | Date Completed: _____ | Completed By: _____ |
| <input type="checkbox"/> Inform employer | Date Completed: _____ | Completed By: _____ |
| <input type="checkbox"/> Secure house & property | Date Completed: _____ | Completed By: _____ |
| <input type="checkbox"/> Arrange funeral | Date Completed: _____ | Completed By: _____ |
| <input type="checkbox"/> Order death certificate | Date Completed: _____ | Completed By: _____ |

First Month

Once the most pressing tasks have been completed, the executor will be moving on to more complex tasks involving the estate of the deceased.

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|---|-----------------------|---------------------|
| <input type="checkbox"/> Hire a lawyer if necessary | Date Completed: _____ | Completed By: _____ |
| <input type="checkbox"/> Submit will to court | Date Completed: _____ | Completed By: _____ |
| <input type="checkbox"/> Cancel unneeded services & subscriptions | Date Completed: _____ | Completed By: _____ |
| <input type="checkbox"/> Request tax identification number for estate | Date Completed: _____ | Completed By: _____ |
| <input type="checkbox"/> Notify Social Security | Date Completed: _____ | Completed By: _____ |
| <input type="checkbox"/> Determine heirs | Date Completed: _____ | Completed By: _____ |
| <input type="checkbox"/> Notify heirs | Date Completed: _____ | Completed By: _____ |
| <input type="checkbox"/> Open estate bank account | Date Completed: _____ | Completed By: _____ |

First 3 Months

Within the first three months, the executor will primarily be notifying the necessary agencies and organizations of the deceased's passing.

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|---|-----------------------|---------------------|
| <input type="checkbox"/> Start probate process if needed | Date Completed: _____ | Completed By: _____ |
| <input type="checkbox"/> Forward mail | Date Completed: _____ | Completed By: _____ |
| <input type="checkbox"/> Inform life Insurance company | Date Completed: _____ | Completed By: _____ |
| <input type="checkbox"/> Notify IRAs and other beneficiary accounts | Date Completed: _____ | Completed By: _____ |
| <input type="checkbox"/> File IRS Form 56 | Date Completed: _____ | Completed By: _____ |
| <input type="checkbox"/> Inventory assets | Date Completed: _____ | Completed By: _____ |
| <input type="checkbox"/> Inventory debts | Date Completed: _____ | Completed By: _____ |

End of Calendar Year

By the end of the calendar year, the executor will have a variety of tax-related tasks to complete to ensure all legal requirements are met.

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|---|-----------------------|---------------------|
| <input type="checkbox"/> Pay local property taxes | Date Completed: _____ | Completed By: _____ |
| <input type="checkbox"/> Provide Schedule K-1 to any trust beneficiaries | Date Completed: _____ | Completed By: _____ |
| <input type="checkbox"/> Submit final decedent income tax returns (1040) | Date Completed: _____ | Completed By: _____ |
| <input type="checkbox"/> Submit estate income tax returns (1041) | Date Completed: _____ | Completed By: _____ |
| <input type="checkbox"/> Submit state filings tax returns | Date Completed: _____ | Completed By: _____ |
| <input type="checkbox"/> Submit personal liability discharge (5495) | Date Completed: _____ | Completed By: _____ |
| <input type="checkbox"/> Submit estate tax form (706) if needed (Within 9 Months) | Date Completed: _____ | Completed By: _____ |
| <input type="checkbox"/> Submit heir forms (8971) if necessary (Within 10 Months) | Date Completed: _____ | Completed By: _____ |
| <input type="checkbox"/> Receive estate tax closing letter (627) if needed | Date Completed: _____ | Completed By: _____ |

When Estate is Closing

- | | | |
|---|-----------------------|---------------------|
| <input type="checkbox"/> Make all distributions | Date Completed: _____ | Completed By: _____ |
| <input type="checkbox"/> Compensate executor | Date Completed: _____ | Completed By: _____ |
| <input type="checkbox"/> Submit probate final accounting | Date Completed: _____ | Completed By: _____ |
| <input type="checkbox"/> Submit probate closing statement | Date Completed: _____ | Completed By: _____ |
| <input type="checkbox"/> Close estate bank account | Date Completed: _____ | Completed By: _____ |
| <input type="checkbox"/> File Final IRS Form 56 | Date Completed: _____ | Completed By: _____ |

Important to note that this is a general checklist, some deadlines vary from state to state, and you should consult an attorney if needed.