DOMINION
LAW GROUP, LLC

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CHECKLIST: For an Executor

- ☐ Assist with the Funeral
- ☐ Find the original Estate Planning Documents and Last Will
- ☐ Contact Attorney to Review Documents and Obtain Advice on the Administrative Process
- ☐ Obtain new Taxpayer Identification Number for the Estate from the Internal Revenue Service (social security number ceases upon death)
- ☐ Keep Beneficiaries Informed
- ☐ Order Death Certificates
- ☐ Put Together Team of Advisors
- ☐ Inventory Assets & Determine Current Values
- ☐ Notify Bank and Other Financial Institutions
- ☐ Open probate in county circuit court and receive Letters of Qualification as Executor
- ☐ Order sufficient number of the Letters of Qualification at the Probate appointment
- ☐ Open a checking account in the name of the estate with your name as the executor
- ☐ Assess the assets of the estate against the debts of the estate, including funeral costs, costs of final illness, to determine if the estate is solvent.

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Consult an attorney if you believe the estate's debts exceed the assets, before making any disbursements

- ☐ Make Partial Distributions to beneficiaries, if Needed
- ☐ Collect IRA, Retirement and Insurance Benefits
- ☐ Take Care of Record Keeping & File Estate and Income Tax Returns
- ☐ Pay Bills & Prepare Inventory if required, and prepare an Accounting if the beneficiaries will need one
- ☐ Distribute Assets According to Terms of the Will