

EXECUTOR'S CHECKLIST

Law Office of Eileen Guerin Swicker
20 W. Market St. Suite E Leesburg, VA 20176
Tel: 571-918-0616 Fax: 703-459-9620 Email: eswicker@swickerlaw.com
www.swickerlaw.com

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This probate checklist serves as a general guideline to administering an estate after the death of a loved one. It is not intended as, and does not provide, specific legal advice.

ESTATE OF _____

DATE OF DEATH _____

EXECUTOR/ADMINISTRATOR
(PERSONAL REPRESENTATIVE) _____

DATE PR QUALIFIED IN CIRCUIT COURT _____

PROBATE OPENED (DATE) _____

INVENTORY DUE _____

ACCOUNTING DUE _____

LAST DATE FOR CREDITORS TO FILE _____

DATE OF FUNDING OF ANY TESTAMENTARY TRUSTS _____

ALTERNATE VALUATION DATE _____

LAST DATE FOR DISCLAIMERS (NINE MONTHS AFTER DEATH) _____

DUE DATE FOR ESTATE TAX FORM 706 _____

A. TAXES DUE _____

B. EXTENSION APPLIED FOR _____

C. EXTENSION GRANTED TO _____

FINAL PERSONAL INCOME TAX RETURN DUE _____

FIDUCIARY INCOME TAX RETURN (IF ANY) DUE _____

FINAL FIDUCIARY INCOME TAX RETURN DUE _____

CHECKLIST UPON DEATH

To do immediately

Read Will

Notify Relatives

Notify Friends

Begin funeral arrangements

Funeral home will provide certified copies of the death certificate

Notify clergy

Notify medical personal if anatomical gift was planned

Conclude funeral arrangements (ask for 20 certified copies of death certificate)

Publish obituary notice in newspapers

If decedent lived alone:

- Notify landlord, utilities, etc
- Advise Post Office to forward mail
- Check homeowners insurance for unoccupied house coverage
- Stop publications delivered to house
- Arrange for lawn care and care of pets

To do within 30-60 days

Obtain Surety Bond unless waived in Will/Trust

Obtain certified copies of death certificate

Change name on any joint checking and savings accts.

Call County Probate office for appointment to present Will, open Probate, and be qualified as the Executor of decedent's estate*

Establish "Estate of ____" bank accounts

Change name on any joint bank accounts

*You may wish to consult an experienced estate planning attorney to discuss whether there is a need to open probate based on your individual circumstances. You should consult an attorney if you believe the debts of the estate to exceed the assets (insolvent estate).

- Transfer accounts listed as "Pay on Death" or "Transfer on Death" _____
- Notify IRA, 401(k) and Keogh account holders to transfer accounts to named beneficiaries _____
- Notify insurance companies and file claims _____
- Notify Veterans Administration to apply for benefits _____
- Notify Social Security to stop/apply for benefits _____
- Complete Form 56 and file with IRS _____
- Notify Medicare, if applicable _____
- Notify decedent's employer benefits office to apply for survivors benefits _____
- Review auto insurance for accidental death, medical, or other coverage _____
- Review medical policies for limits or additional coverage _____
- Check for travel accident coverage, if applicable _____
- Check for Workers' Compensation benefits _____
- Check credit card and club membership benefits _____
- Check for safe deposit box and who has access and when access allowed, inventory contents _____
- Obtain safe deposit box in your name and inventory contents transferred there _____
- Retain attorney competent in estate administration if there is probate administration _____
- Retain accountant competent in estate/inheritance taxes _____
- Retain financial advisor _____
- Keep record of expenses for funeral and last illness _____
- Transfer real estate to heirs' name _____
- Change name on homeowners' insurance policy _____
- Transfer title of autos owned solely by decedent to "estate of _____" _____
- Change name on auto insurance policies _____
- Change name on credit accounts, or close _____
- Change name on utility accounts _____
- Change name in phone directory _____
- Notify creditors of death _____
- Review beneficiaries on your insurance policies _____
- Review your medical insurance _____
- Review your will/trust _____
- When probate closed, make distributions to heirs _____

To do within six to twelve months

Disclaim any asset you wish within nine months after date
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- of death _____
- Complete a new budget for yourself _____
- Review your insurance and investment plans _____
- Consider your disability coverage _____
- Review old records of bank and check statements _____
- Obtain a new written valuation of assets, where needed _____
- File appropriate tax returns
 - Estate tax nine months after death _____
 - Final personal income tax by April 15
of next year _____
 - Fiduciary income tax as required _____
- If probate was opened, file inventory and accountings as
required by the Commissioner of Accounts _____