



Planning considerations for executors

Every estate is different. Here's a starting list of things to consider for those who have been appointed as executor. You can use the blanks below to add your own ideas as you consult with a trust and estate attorney.

Check on the needs of loved ones left behind. Consider well-being and financial needs of dependents and care of pets.

Create a notification plan for family and friends.

Contact decedent's trust and estate attorney and other professionals.

If nominated as executor, contact an attorney to discuss qualifying with the court to be appointed executor.

Contact decedent's employer. If decedent was self-employed, determine how to gather pertinent records.

Identify paperwork you may need, such as:

- Estate planning documents
- Copies of the death certificate
- Federal and state income tax returns
- Insurance policies — life, home, auto, and other property and casualty insurance
- Statements from financial institutions
- Bills — credit cards, utilities, hospital, medical care, loans, etc.
- Ownership documents
- Social Security Administration correspondence
- Digital assets and accounts

Identify other people and organizations with a need to know, including but not limited to:

- Financial institutions where the decedent had accounts or safe deposit boxes
 - Accountant, financial advisor, and tax advisor
 - Life insurance companies
 - Current and former employers and agencies from which the decedent received benefits
 - Mortgage lenders and county recorder or registrar
 - Utilities, services, and creditors
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This information is designed to provide general information regarding the estate settlement process, but it is not exhaustive. We encourage you to work closely with your tax advisor and estate planning attorney during this difficult time.

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Any estate plan should be reviewed by an attorney who specializes in estate planning and is licensed to practice law in your state.

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