

# Successor Trustee/Executor Duties Checklist

## Immediate Successor Trustee/Executor Duties

Contact mortuary or funeral home regarding services

Contact cemetery regarding burial or cremation

Contact local newspaper with obituary information

Contact relatives and close friends

Contact employer and business associates

Contact lawyer and accountant

Arrange for pallbearers

Contact guardians or trustees named in will

Arrange for immediate care of decedent's children

Arrange for living expenses for decedent's spouse

Contact veterans' organizations

## Successor Trustee/Executor Duties within First Month

Contact life insurance agent and report death

Contact general insurance agent

Contact medical and health insurance companies

Contact Medicare

Contact union regarding pensions and death benefits

Contact employer regarding pensions and death benefits

Contact military regarding pensions and death benefits

Contact Social Security Administration

Obtain death certificates from attending physician

Contact IRA or KEOGH account trustees

Contact county recorder

Contact post office

Contact Department of Motor Vehicles

Arrange for management of business or real estate holdings

Review all of decedent's records and legal documents

Contact gas, telephone, cable, electric, trash, and water companies

Contact newspaper and magazine subscription departments

Contact credit card companies

## Successor Trustee/Executor Financial Duties

*These cannot be delegated.*

Begin inventory of assets

Arrange for appraisal of assets

Begin collection of assets

Contact banks, savings and loans, and credit unions

Contact mortgage companies

Contact stockbroker and investment counselor

Open bank accounts for estate

Open decedent's safe deposit box

File the will with probate court

Inventory all estate assets

Collect all monies and property due to decedent

Pay all taxes due and file all necessary tax returns

Provide notice to all creditors of time limit for claims

Pay all debts and expenses of decedent, including funeral expenses

Arrange for sale of estate assets, if necessary

Distribute all remaining assets according to will

Submit final accounting and receipts to probate court

Close estate books and affairs