



DECEMBER 10, 2025

# EXECUTOR MASTER CHECKLIST - COMPLETE 25-STEP PROGRESS TRACKER

PROFESSIONAL EXECUTOR CHECKLIST FOR ESTATE  
ADMINISTRATION

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EXECUTOR  
MASTER CHECKLIST

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Complete 25-Step Progress Tracker  
From Appointment to Estate Closure

PURPOSE

This comprehensive checklist tracks your progress through all five phases of serving as executor. Use this professional workbook to:

- ✓ Document completion dates for each of 25 critical steps
- ✓ Track important deadlines and court dates
- ✓ Record notes and decisions at each phase
- ✓ Verify phase completion before advancing
- ✓ Maintain organized documentation for court

HOW TO USE THIS CHECKLIST

1. Work through steps in chronological order (do not skip phases)
2. Check box when complete and record date
3. Use notes sections for decisions and details
4. Complete verification checklist before next phase
5. Keep with estate files for court reference

PROFESSIONAL USE

Funeral directors, estate attorneys, and financial advisors:  
Feel free to print and distribute this checklist to executor clients.

## ESTATE INFORMATION

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<b>Deceased's Full Name:</b>	<hr/>
<b>Date of Death:</b>	<hr/>
<b>Executor Name:</b>	<hr/>
<b>Executor Phone:</b>	<hr/>
<b>Attorney Name (if hired):</b>	<hr/>
<b>Attorney Phone:</b>	<hr/>
<b>Court Case Number:</b>	<hr/>
<b>Estate EIN:</b>	<hr/>
<b>Estate Bank Account:</b>	<hr/>

PHASE 1  
IMMEDIATE ACTIONS

First 72 Hours

Critical first steps to secure assets and begin documentation.

<input type="checkbox"/> <b>STEP 1: Locate and Secure Original Will</b>	Date
<input type="checkbox"/> Found original will with signatures (not copy)	_____
<input type="checkbox"/> Made copies and secured original in safe location	_____
<input type="checkbox"/> <b>STEP 2: Obtain Death Certificates (10+ certified copies)</b>	Date
<input type="checkbox"/> Ordered from funeral home or vital statistics office	_____
<input type="checkbox"/> <b>STEP 3: Secure Physical Assets</b>	Date
<input type="checkbox"/> Changed locks on real estate (documented with receipts)	_____
<input type="checkbox"/> Photographed all rooms and contents for inventory	_____
<input type="checkbox"/> Verified property insurance remains active	_____
<input type="checkbox"/> <b>STEP 4: Notify Key Parties</b>	Date
<input type="checkbox"/> Notified all beneficiaries named in will (certified mail)	_____
<input type="checkbox"/> Contacted Social Security Administration (1-800-772-1213)	_____
<input type="checkbox"/> Notified banks and financial institutions to freeze accounts	_____

<input type="checkbox"/> <b>STEP 5: Create Executor Filing System</b>		<b>Date</b>
<input type="checkbox"/>	Established physical and digital filing systems	_____
<input type="checkbox"/>	Began executor log documenting all actions and decisions	_____

### PHASE 1 COMPLETION VERIFICATION

- All 5 steps above are checked and dated
- Original will is secured in safe location
- Death certificates received (minimum 10 certified copies)
- Property is secured, locks changed, and photographed
- Filing system established and executor log started

### PHASE 1 NOTES

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→ Continue to Phase 2

PHASE 2

OPENING PROBATE

Weeks 1-4

Establish legal authority to act as executor through probate court.

<input type="checkbox"/> <b>STEP 6: Determine if Probate Required</b>	<b>Date</b>
<input type="checkbox"/> Researched state probate threshold and requirements	_____
<input type="checkbox"/> Decision made: <input type="checkbox"/> Full Probate <input type="checkbox"/> Small Estate Affidavit	_____
<input type="checkbox"/> <b>STEP 7: File Probate Petition</b>	<b>Date</b>
<input type="checkbox"/> Filed petition with appropriate probate court	_____
<input type="checkbox"/> Paid filing fee (save receipt for estate accounting)	_____
<input type="checkbox"/> Court hearing scheduled	_____
<input type="checkbox"/> <b>STEP 8: Obtain Letters Testamentary</b>	<b>Date</b>
<input type="checkbox"/> Attended court hearing (if required by state)	_____
<input type="checkbox"/> Received Letters Testamentary (obtained 5+ certified copies)	_____
<input type="checkbox"/> <b>STEP 9: Obtain Estate EIN (Employer Identification Number)</b>	<b>Date</b>
<input type="checkbox"/> Applied online at IRS.gov for estate EIN	_____
<input type="checkbox"/> <b>STEP 10: Open Estate Bank Account</b>	<b>Date</b>

Opened dedicated estate checking account with EIN \_\_\_\_\_

## PHASE 2 COMPLETION VERIFICATION

- All 5 steps above are checked and dated
- Probate petition filed and accepted by court
- Letters Testamentary received (5+ certified copies)
- Estate EIN obtained from IRS
- Estate bank account opened and active

### PHASE 2 NOTES

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→ Continue to Phase 3

PHASE 3  
ESTATE ADMINISTRATION  
Months 1-6

Inventory assets, manage property, notify creditors, and file required tax returns.

<b>□ STEP 11: Complete Comprehensive Asset Inventory</b>		<b>Date</b>
<input type="checkbox"/>	Inventoried all financial assets (banks, investments, retirement)	_____
<input type="checkbox"/>	Inventoried all real property (homes, land, rental properties)	_____
<input type="checkbox"/>	Inventoried personal property (vehicles, jewelry, collectibles)	_____
<input type="checkbox"/>	Inventoried digital assets (crypto, domain names, online accounts)	_____
<input type="checkbox"/>	Obtained professional appraisals for high-value items	_____
<b>□ STEP 12: Notify Creditors &amp; Publish Legal Notices</b>		<b>Date</b>
<input type="checkbox"/>	Sent certified mail to all known creditors	_____
<input type="checkbox"/>	Published legal notice in local newspaper (check state requirements)	_____
<b>□ STEP 13: Pay Ongoing Estate Expenses</b>		<b>Date</b>
<input type="checkbox"/>	Paid funeral and burial costs from estate account	_____
<input type="checkbox"/>	Maintaining property insurance, mortgage, utilities from estate account	_____
<b>□ STEP 14: Manage Estate Property</b>		<b>Date</b>
<input type="checkbox"/>	Real estate maintained (repairs, landscaping, insurance current)	_____

<input type="checkbox"/>	Investment accounts reviewed (no unauthorized trading/changes)	_____
<input type="checkbox"/>	<b>STEP 15: File Required Tax Returns</b>	<b>Date</b>
<input type="checkbox"/>	Final individual income tax (Form 1040) filed for deceased	_____
<input type="checkbox"/>	Estate income tax (Form 1041) filed if estate earned income	_____
<input type="checkbox"/>	Estate tax (Form 706) filed if estate exceeds federal threshold	_____
<input type="checkbox"/>	<b>STEP 16: Address Specific Asset Types</b>	<b>Date</b>
<input type="checkbox"/>	Retirement accounts: Contacted plan administrators	_____
<input type="checkbox"/>	Life insurance: Filed all claims with beneficiary designations	_____
<input type="checkbox"/>	Real estate: Decision made ( <input type="checkbox"/> Sell <input type="checkbox"/> Distribute to beneficiaries)	_____
<input type="checkbox"/>	Vehicles: Titles transferred or vehicles sold through estate	_____

### PHASE 3 COMPLETION VERIFICATION

- All 6 steps above are checked and dated
- Complete asset inventory filed with court if required
- Creditors notified via mail and publication
- All required tax returns filed with IRS and state
- Property maintained and properly managed



Special assets (retirement, insurance, real estate) addressed

### PHASE 3 NOTES

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→ Continue to Phase 4

PHASE 4  
CREDITOR CLAIMS & DISTRIBUTIONS  
Months 6-12

▲ CRITICAL WARNING ▲

Do NOT distribute assets to beneficiaries until creditor claim period expires and ALL valid claims are paid. Personal liability for premature distributions can exceed \$50,000.

<input type="checkbox"/> <b>STEP 17: Evaluate &amp; Pay Valid Creditor Claims</b>	Date
<input type="checkbox"/> Creditor claim period expired (verify state deadline)	_____
<input type="checkbox"/> Reviewed all claims filed against estate	_____
<input type="checkbox"/> Paid valid claims in statutory priority order	_____
<input type="checkbox"/> Contested invalid or excessive claims if necessary	_____
<input type="checkbox"/> <b>STEP 18: Prepare Estate Accounting</b>	Date
<input type="checkbox"/> Prepared complete accounting (assets, income, expenses, distributions)	_____
<input type="checkbox"/> Calculated executor compensation per state statute	_____
<input type="checkbox"/> <b>STEP 19: Obtain Beneficiary Approvals &amp; Releases</b>	Date
<input type="checkbox"/> Shared complete accounting with all beneficiaries	_____
<input type="checkbox"/> Gave beneficiaries 30 days to review and ask questions	_____

<input type="checkbox"/>	Obtained signed releases from all beneficiaries	_____
<input type="checkbox"/>	<b>STEP 20: Distribute Assets to Beneficiaries</b>	<b>Date</b>
<input type="checkbox"/>	Made cash distributions from estate account	_____
<input type="checkbox"/>	Transferred property titles/deeds to beneficiaries	_____
<input type="checkbox"/>	Obtained signed receipts for ALL distributions	_____
<input type="checkbox"/>	<b>STEP 21: Make Final Tax Payments</b>	<b>Date</b>
<input type="checkbox"/>	All tax returns filed and paid in full	_____
<input type="checkbox"/>	Obtained tax clearance/closing letter from IRS	_____

#### PHASE 4 COMPLETION VERIFICATION

<input type="checkbox"/>	All 5 steps above are checked and dated
<input type="checkbox"/>	Creditor claim period expired (verified deadline)
<input type="checkbox"/>	All valid claims paid in statutory priority order
<input type="checkbox"/>	Complete accounting prepared and shared with beneficiaries
<input type="checkbox"/>	Beneficiary releases obtained from ALL beneficiaries
<input type="checkbox"/>	Distributions made ONLY after claim period expired
<input type="checkbox"/>	IRS tax clearance letter received

#### PHASE 4 NOTES

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→ Continue to Phase 5

PHASE 5  
CLOSING THE ESTATE  
Months 12-18

File final accounting with court, obtain discharge, and formally close estate.

<b>□ STEP 22: File Final Accounting with Court</b>		<b>Date</b>
<input type="checkbox"/>	Prepared final accounting for court (all assets, expenses, distributions)	_____
<input type="checkbox"/>	Filed final accounting with probate court	_____
<input type="checkbox"/>	Final court hearing scheduled	_____
<b>□ STEP 23: Petition for Discharge</b>		<b>Date</b>
<input type="checkbox"/>	Filed petition for discharge with court	_____
<input type="checkbox"/>	Attended final court hearing	_____
<input type="checkbox"/>	Court approved final accounting and granted discharge	_____
<input type="checkbox"/>	Received signed court order closing estate	_____
<b>□ STEP 24: Distribute Court Order</b>		<b>Date</b>
<input type="checkbox"/>	Sent certified copies to all beneficiaries	_____
<input type="checkbox"/>	Sent copies to attorney (if hired)	_____
<input type="checkbox"/>	Sent copies to institutions holding estate assets	_____
<b>□ STEP 25: Retain Estate Records</b>		<b>Date</b>

<input type="checkbox"/>	Organized all estate records for long-term storage	_____
<input type="checkbox"/>	Stored securely (retain for 7 years minimum per IRS requirement)	_____

### PHASE 5 COMPLETION VERIFICATION

- All 4 steps above are checked and dated
- Final accounting filed with court
- Court discharge granted and order received
- Copies of court order distributed to all parties
- All estate records organized and stored securely

✓ ESTATE CLOSURE COMPLETE!

### PHASE 5 NOTES

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## FINAL ESTATE STATISTICS

Estate Opened (Date):	_____
Estate Closed (Date):	_____
Total Time as Executor:	_____
Total Estate Value:	_____
Total Expenses Paid:	_____
Total Distributed to Beneficiaries:	_____
Your Executor Compensation:	_____

## FINAL REFLECTIONS & NOTES

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