



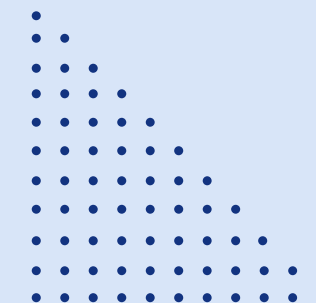
12/13/2025

# THE EXECUTOR'S FIRST 30 DAYS:

A Professional Timeline

What to do when someone dies and you're named executor

[MEMORIALMERITS.COM](http://MEMORIALMERITS.COM)



# BEFORE YOU START

Being named executor is both an honor and a significant legal responsibility. Here's what you need to understand before taking any action:

- You've been named executor. What does that mean?
- Legal fiduciary duty to estate and beneficiaries
- Timeline: 12-24 months typical
- Personal liability for mistakes

[Complete Executor Guide: MemorialMerits.com/executor-guide](https://MemorialMerits.com/executor-guide)

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# DAY 1 - IMMEDIATE ACTIONS

The first 24 hours set the tone for the entire process. Focus on securing property and locating critical documents:



## Secure the property

Change locks, remove valuables, and photograph the property.



## Contact funeral home if not already done

They handle body transport and file the death certificate.



## Locate the will and death certificate

Find the original signed will and request death certificates from funeral home.



## Notify immediate family

Inform closest relatives directly before they hear from others.

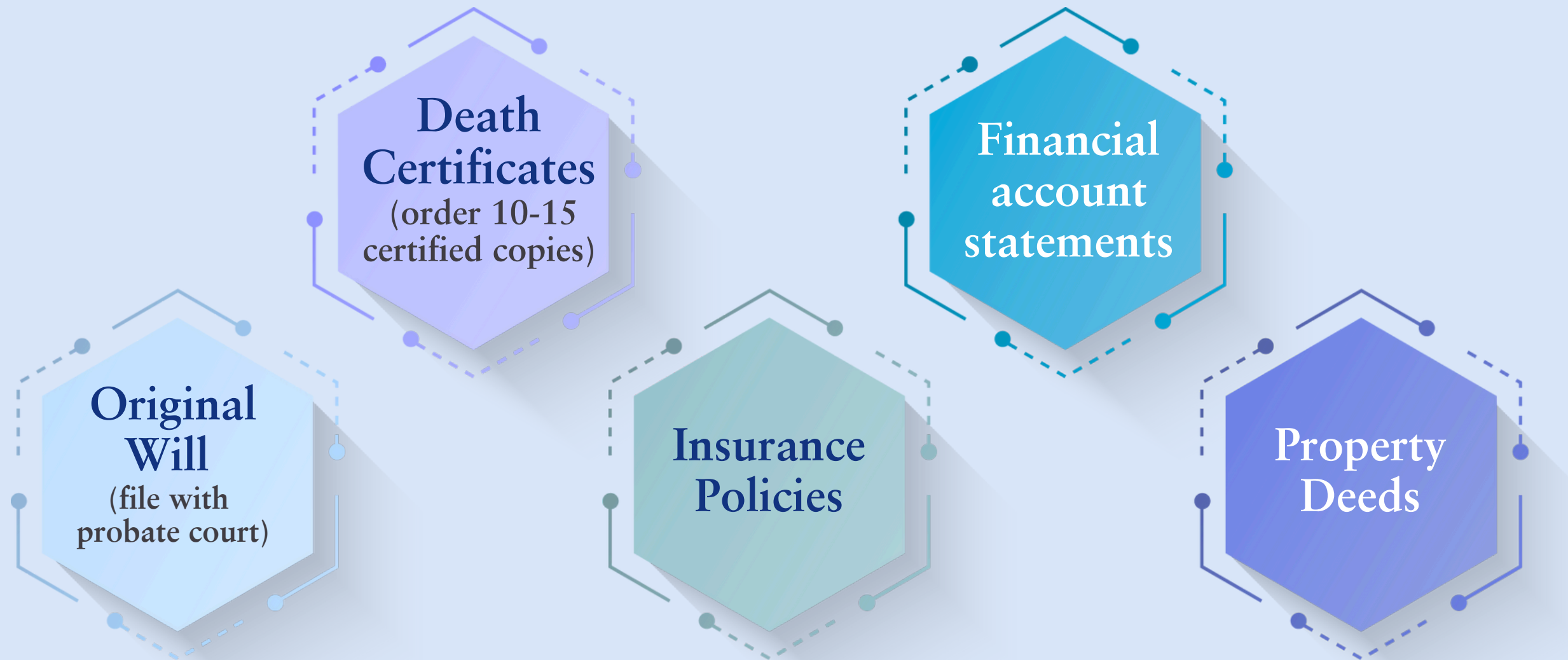
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# DAYS 2-3

## CRITICAL DOCUMENTS

You'll need multiple copies of these documents throughout the process. Start gathering them now before meetings with attorneys or banks:



A close-up photograph of a hand placing a coin on top of a stack of coins. Several other stacks of coins are visible in the foreground, each with a small green tree growing out of the top. The background is blurred, showing a person in a suit.

# FIRST WEEK: NOTIFICATIONS

Legal notifications must happen quickly to prevent fraud and stop unnecessary charges. Start with these essential contacts:

- **Social Security Administration**  
Stops benefit payments and prevents identity theft.
- **Employer (if applicable)**  
Finalizes last paycheck, benefits, and retirement accounts.
- **Banks and Financial Institutions**  
Freezes accounts to prevent unauthorized withdrawals.
- **Insurance Companies**  
Initiates life insurance claims and cancels other policies.
- **Credit Bureaus (fraud prevention)**  
Places deceased alert to stop fraudulent credit applications.



# FIRST WEEK: PROBATE COURT

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## Protect Yourself & The Estate

You cannot legally act on behalf of the estate until the court grants you authority. Here's how to start the probate process:

 File petition to open probate

 Submit original will

 Request Letters Testamentary

 Court date scheduled (varies by jurisdiction)

# WEEK 2: ASSET INVENTORY BEGINS

Creating a comprehensive inventory protects you legally and helps with accurate distribution. Document everything, even items that seem insignificant:

- **List all assets with values**
- **Bank accounts, investments, property**
- **Vehicles, personal property**
- **Digital assets and accounts**
- **Business interests**



# WEEK 2: CREDITOR NOTIFICATIONS

This step is legally required in most states and protects you from unknown creditors appearing later. Critical: do not pay anyone yet:

- Publish death notice (legal requirement in most states)
- Open estate bank account
- Notify known creditors
- DO NOT pay anyone yet (except secured debts on property)



# WEEK 3: COURT APPEARANCE

This hearing grants you legal authority to act. Without these documents, banks and institutions cannot work with you:

- ✓ **Attend probate hearing**
- ✓ **Receive Letters Testamentary (legal authority)**
- ✓ **Now you can legally act on behalf of estate**



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# WEEK 3-4: APPRAISALS



Accurate valuations are essential for tax purposes and fair distribution. Professional appraisals protect you from beneficiary disputes:

- Real estate appraisal
- Personal property assessment
- Vehicle valuations
- Professional appraisers for valuables

# WEEK 4: FINANCIAL ACCOUNTS

Transferring accounts to the estate prevents unauthorized access and simplifies tracking. Never mix estate funds with your personal accounts:

- **Transfer accounts to estate name**
- **Close individual accounts**
- **Consolidate funds in estate account**
- **Do NOT distribute to beneficiaries yet**



# DAYS 25-30: TAX PREPARATION

Tax obligations don't end with death, and missing deadlines can result in penalties you're personally responsible for:

- Determine if estate tax return required (estates >\$13.61M in 2024)
- File final personal income tax return
- Obtain tax ID (EIN) for estate
- Consult tax professional



# END OF MONTH 1: STATUS CHECK

By day 30, these foundational steps should be complete. If you're behind, prioritize court filings and creditor notifications:

- **Complete asset inventory filed with court**
- **All creditors notified**
- **Accounts transferred to estate**
- **Appraisals completed**
- **Next: Creditor claims period  
(typically 3-6 months)**



# COMMON MISTAKES IN FIRST 30 DAYS

These errors can result in personal financial liability or legal consequences. Avoid them by following the timeline carefully:

- PAYING BENEFICIARIES BEFORE CREDITORS (PERSONAL LIABILITY)
- MISSING COURT DEADLINES
- NOT SECURING PROPERTY (THEFT/DAMAGE CLAIMS)
- COMMINGLING ESTATE FUNDS WITH PERSONAL
- ACTING BEFORE RECEIVING LETTERS TESTAMENTARY



# WHEN TO HIRE PROFESSIONALS

Complex estates require specialized expertise. Hire professionals early to avoid costly mistakes:

- ✓ Estate value >\$500K
- ✓ Complex assets (business, multiple properties)
- ✓ Family disputes
- ✓ Tax complications
- ✓ Out-of-state property



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# WHAT COMES NEXT (MONTHS 2-12)



**What's  
Next?**

A yellow diamond-shaped road sign with a black border and the text 'What's Next?' in bold black letters. The sign is set against a circular background of a cloudy sky at sunset or sunrise.

**The first 30 days establish the foundation. Here's what the remaining timeline typically involves:**

- CREDITOR CLAIMS PERIOD
- PAY VALID DEBTS
- SELL ASSETS IF NEEDED
- PREPARE FINAL ACCOUNTING
- DISTRIBUTION TO BENEFICIARIES
- CLOSE ESTATE

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# RESOURCES

Memorial Merits provides comprehensive executor support and free resources to guide you through the entire process:

- ✓ Free Executor Guide: [MemorialMerits.com](https://MemorialMerits.com)
- ✓ State-specific probate rules
- ✓ Professional referrals (attorneys, CPAs)
- ✓ Grief support resources

## START HERE

Start Your Preparation with this [Executor Guide, Video & Free Downloadable PDF Workbook](#) or review our [directory of Estate Planning & Probate Assistance](#) Partnerships

## Also Including:

- ➔ Instructional Videos
- ➔ Comprehensive How-To Articles
- ➔ Step-By-Step Instructions
- ➔ **Solace** - Free specialized AI for end-of-life planning & grief support
- ➔ **Free** Printable PDF Download Guides, Workbooks & Checklists
- ➔ Products & Services Directories
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# FREE RESOURCES & DISTRIBUTION RIGHTS

## All Memorial Merits Resources Are FREE

- ✓ Executor Guides & Checklists ✓ Estate Planning Worksheets
- ✓ Legacy Planning Workbooks ✓ Grief Support Materials ✓ Memorial Planning Templates

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- ✓ Include in client packets ✓ Distribute at seminars or workshops ✓

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Built by someone who lost a father and nearly died himself.

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