

# Personal Representative Duties Checklist

## Immediately After Death —

### Locate and review the Last Will

- Find and review the most recent Last Will and Testament, including any [codicils](#) (addenda or additions)
- Note any special instructions in the Last Will, especially any funeral or burial requests

### Deal with End-of-Life Arrangements

- Find and review the deceased's End-of-Life Plan or other funeral planning document (if one exists)
- Make funeral arrangements, if you are family or give plans to family if you are not OR find someone to plan the funeral, if not [pre-planned](#), and make any arrangements
- Make arrangements for someone, usually the family, to take care of remains (cremation, burial, etc.)
- Provide needed assistance to family
- Obtain death certificate
- Arrange care and [guardianship](#) for dependent children and pets, according to the will

## Within a Few Days to Weeks of Death

### Organize and Secure Assets

- Go over the will in more detail to identify assets and understand the instructions provided
- Locate and collect all of the decedent's assets
- Freeze all accounts
- Take control of all assets and property, including business interests, valuables, personal property, important papers, their primary residence, vacation homes, etc.
- Keep assets safe until they are transferred to the beneficiaries
- Locate any security deposit boxes, and gather all important documentation, including property deeds, share certificates, identification, insurance policies, and all other contracts (leases, business agreements, marriage/separation papers, etc.)
- Arrange for the transfer of any assets that are jointly owned to the surviving owner
- Determine if any [non-probate assets](#) are included in the estate and arrange transfer of those

### Notify All Appropriate People or Organizations

- Notify beneficiaries of their inheritance, usually includes a Notice to Heirs
- Notify [all other parties](#) that were affiliated with the deceased
- Redirect or forward mail and other correspondence

### Begin the [Probate Process](#)

- Decide if probate will be involved
- Submit the will to the proper probate court, even if the will does not have to go through the probate process
- Include a detailed inventory of the estate's assets, including items of personal property without title documents if required in your state
- File a petition with the court to be appointed an executor along with forms for a Letter of Testamentary
- Inquire if an expedited or simplified process is possible
- Represent the estate if required to appear in court on behalf of the estate

### Manage Finances and Pay Debts

- Stop all necessary payments or subscriptions (paper and web-based) and cancel credit cards
- Locate all ongoing payments or debts then pay or arrange to pay all outstanding debts and bills
- Open [estate account](#)
- Claim life insurance if there is no beneficiary and any other benefits, such as veteran's or Social Security benefits, as well as outstanding money owed to the deceased, such as wages or dividends
- Pay for funeral or medical bills (this step may be omitted if prepaid)
- Review and list investments and other assets (both property and business)
- Notify creditors according to state procedures, evaluate each claim, and pay if legitimate
- Arrange for spousal and/or child support payments through court
- Continue to pay any ongoing bills, such as mortgages, utilities, etc.
- Sell assets, if necessary to pay bills

## Within Months of Death

### Pay Taxes and Final Fees

- File state and federal income tax return for the deceased
- Pay [estate tax](#) if required
- File necessary federal and state tax returns for estate and/or [inheritance tax](#)
- Pay any outstanding fees (lawyer, accountant, etc.)
- Claim executor fees

### Distribute Estate

- Deliver gifts and/or assets to beneficiaries or organizations/charities
- Disperse residue of estate to beneficiaries according to Last Will

### Close Estate

- Maintain, organize, and file all records, including receipts and evidence of disbursements
- Contact beneficiaries with final report about the closing of the estate, including what was collected and disbursed by the estate
- Close estate bank account after all payments are made and checks have cleared
- Apply for tax release by probate court