



The Paper Tigress

BASIC EXECUTOR GUIDE



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This guide is not to be considered legal advice, may not be up-to-date, and should be used with advice from an estate attorney. It is intended to be a general guideline. Each state has its own laws.

As an executor, your duty is to the deceased and his or her estate, before the interests of the heirs & beneficiaries. You will have to potentially work with an estate attorney, a tax advisor, county courts and the IRS. The more information you have from the person appointing you, the easier and less costly the process will be.

Paper Tigress does provide executor assistance for estates in New Castle & Chester counties.



Executor Duties

Understand [general terms](#) used in estate planning & administration.

MOST URGENT

Find the will, if it exists.

Obtain copies of Death Certificate from funeral director (usually).

File Death Certificate with court to obtain Letters Testamentary (Short Certificate)

Obtain [EIN for estate](#) from [IRS.gov](#)

Open estate checking account if there will be income or expenses.

Publish death notice as required in your state.

NEXT STEPS

Determine contents of Safe Deposit Box if any.

Inventory of the estate ([probatable assets](#) only).

Letters to notify [creditors](#), employer, all stakeholders.

Consolidate estate holdings where possible.

Put [fraud alert](#) on SSN to prevent new accounts being opened.

Distribute non-probate assets.

Deposit income from estate, except for [Social Security](#).

Pay [debts of the estate](#) (order of precedence exists in most states).

Close or retitle accounts; consider autodrafts/payments.

File & pay [federal taxes](#).

File & pay state taxes.

Distribute remainder estate to heirs.

File final accounting with state, final return with IRS.

Pay tax on net probatable estate

Inheritance tax applies in [some states](#).

Executors are fiduciaries and must act in the best interest of the estate, not themselves or other beneficiaries. Many of these steps have deadlines so be sure you know what they are in your state. Forms and rules are often available on your county or state website.

For further assistance, consult with an estate attorney. Some attorneys do estate *planning* but not estate *administration* and we are able to help you with that process.

Is Leaving an Organized Legacy Important to You?

The Paper Tigress Legacy Organizer & Executor Handbook is part of our [Legacy of Love](#)™ Program that helps you organize, review, and document your affairs so you loved ones will not have to struggle or be overwhelmed if something happens to you. [Find out more...](#)