

Estate Executor

If you've named an executor in your Will, this section is for them.

Being an executor is a big job. It's not just about reading the Will and handing out inheritances. There's paperwork, phone calls, court applications, tax returns, and a lot of admin that most executors aren't prepared for.

This section gives your executor a roadmap. It tells them what their role involves, what you expect from them, and where to find the information they'll need.

What does an executor actually do?

Your executor is responsible for managing your estate from the day you die until everything is distributed to your beneficiaries. Here's what that involves:

Organize your funeral (unless someone else is handling it).

Locate your Will and find out whether probate is needed (this varies by state and by the size and type of your estate, so your executor should check with an attorney early on).

Notify relevant people and organizations (family, banks, Social Security, your employer, etc.).

Secure your property and assets (lock up your house, take care of your car, protect valuables).

Value your estate (work out what you own and what you owe).

Pay your debts (credit cards, loans, mortgages, final bills).

File your final tax return and pay any taxes owed.

Distribute your assets according to your Will.

Close your estate and provide a final accounting to beneficiaries.

This process can take many months, sometimes longer, depending on your state and how complicated your estate is. Your executor's attorney can give a realistic timeframe for your situation.

What you can do to help your executor:

You can't make their job easy (it's never easy). But you can make it easier.

By completing this organizer, you've already done most of the hard work. Your executor will know where your Will is, what assets you own, who to contact, and what your wishes are.

But you can also leave them specific instructions. Things like:

"Sell the house and split the proceeds. Don't let it sit empty for months."

"Make sure my dog goes to Sarah. She's already agreed to take him."

"Use my retirement account (401(k)/IRA) death benefit to pay off the mortgage before distributing other assets."

"Don't feel pressured to keep the family home if it's too expensive to maintain. Sell it if that makes sense."

These notes aren't a substitute for your legal documents, but they give your executor helpful guidance when they're making decisions. Your formal documents (like your Will, trusts and beneficiary designations) are what carry legal weight, so keep those up to date with your attorney.

Let's make this clear for them.

A MESSAGE TO YOUR EXECUTOR

If you're reading this, I've died, and you've agreed to be my executor. Thank you.

I know this is a big responsibility, and I'm grateful you've taken it on.

This organizer is here to help you. It contains everything you need to know about my assets, my debts, my contacts, and my wishes. Use it as your roadmap.

A few things to remember:

Take your time. There's no rush. Grief is exhausting, and estate administration is complicated. Don't feel pressured to do everything at once.

Get professional help. You don't have to do this alone. My lawyer (details in the Key Contacts section) can guide you through probate. My accountant can help with the tax return. Use them.

Don't feel guilty about being paid for your time. In many cases an executor can receive a fee for their work, though how that's set depends on your state and on your Will. Check with the estate's attorney or accountant about what applies here.

Ignore unhelpful family members. Some people will question your decisions, complain about timelines, or demand updates every week. You're doing your best. That's enough.

Follow the Will, not the drama. Your job is to carry out my wishes as written in my Will, not to make everyone happy. You can't please everyone, so don't try.

Thank you for doing this. I trust you. And I've tried to make it as easy as possible.

You've got this.

Your Estate Executor

A few key details and any instructions to guide whoever carries out your wishes.

INFORMATION FOR YOUR EXECUTOR

EXECUTOR'S NAME (AS NAMED IN YOUR WILL)

WHERE THIS ORGANIZER IS KEPT

WHO ELSE KNOWS ABOUT THIS ORGANIZER

ANYTHING COMPLEX ABOUT YOUR ESTATE?

Complexities might include overseas assets, family disputes, business interests, or trusts.

READ THIS FIRST

A Message to Your Executor

YOUR INSTRUCTIONS FOR YOUR EXECUTOR - AND ANYTHING ELSE THEY NEED TO KNOW