

Executor Timeline

Being an executor is a marathon, not a sprint.

The work doesn't end after the first week. Settling an estate typically takes 6-12 months (sometimes longer if it's complicated).

This timeline breaks down what needs to happen at each stage: the first week, the first month, the first three months, and the first year.

Use this as a guide, not a strict schedule. Every estate is different. Some things will take longer than expected. Some will move faster. That's normal.

Your timeline: What to expect and when

Your Executor Timeline

What to do and when, from the first week through to the end of the first year.

THE FIRST WEEK

Secure the property and valuables

Register the death (usually handled by your funeral director; timeframes vary by state, and order multiple certificates)

Arrange the funeral

Locate the Will and this Estate Organizer

Contact the lawyer

Notify immediate family and close friends

Secure all financial documents

Start keeping detailed records

THE FIRST MONTH

Apply for probate if it's required (whether you need it, and how long it takes, varies by state, so check your state's probate court or ask the lawyer what applies)

Notify all relevant organizations (banks, retirement savings, Social Security, insurers)

Cancel or transfer services

Secure and value all assets

Identify all debts

Claim life insurance

Claim retirement plan (401(k)/IRA) death benefits

Keep paying urgent bills

Your Executor Timeline (cont.)

THE FIRST THREE MONTHS

- Obtain Letters Testamentary (if applicable)
- Open an estate bank account
- Collect all assets
- Pay debts in the order that applies in your state (the priority of different debts varies, and paying them in the wrong order can create problems, so confirm the order with the lawyer first)
- File the final tax return
- Deal with property
- Manage business interests (if applicable)
- Cancel digital accounts (if instructed)
- Respond to creditors

THE FIRST SIX MONTHS

- Prepare estate accounts
- Obtain IRS clearance
- Prepare distribution schedule
- Communicate with beneficiaries
- Resolve any disputes

Your Executor Timeline (cont.)

THE FIRST YEAR

Distribute the estate

Finalize estate accounts

Close the estate bank account

Retain records

If you're entitled to a fee for acting as executor, claim it properly. Whether you can be paid, and how much, depends on your state, the Will, and sometimes the beneficiaries or the court, so check with the lawyer first and keep it documented.

NOTES: PROGRESS, DATES, AND ANYTHING OUTSTANDING