

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 Organiser

Contact the solicitor

Notify immediate family and close friends

Secure all financial documents

Start keeping detailed records

THE FIRST MONTH

Apply for probate if required (timeframes vary by state and can take several weeks or longer, so check your state's Supreme Court registry)

Notify all relevant organisations (banks, super, Centrelink, insurers)

Cancel or transfer services

Secure and value all assets

Identify all debts

Claim life insurance

Claim super death benefits

Keep paying urgent bills

Your Executor Timeline (cont.)

THE FIRST THREE MONTHS

- Obtain Grant of Probate (if applicable)
- Open an estate bank account
- Collect all assets
- Pay all debts in the correct order
- Lodge 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 ATO clearance
- Prepare distribution schedule
- Communicate with beneficiaries
- Resolve any disputes

Your Executor Timeline (cont.)

THE FIRST YEAR

Distribute the estate

Finalise estate accounts

Close the estate bank account

Retain records

Apply for an executor's commission only if you are entitled to one (this needs a clause in the Will, the agreement of all beneficiaries, or the court's approval, so check with your solicitor first)

NOTES: PROGRESS, DATES, AND ANYTHING OUTSTANDING