THE ESTATE ORGANISER . AUSTRALIA

The Executor's Companion

The working file for administering an Australian estate. One steady place for every decision, contact, letter and dollar, from the first days to the final distribution.

- A steady path through the first days and months
- A decisions diary that protects you later
- Contact, correspondence and money logs, built to last the year
- Letter templates and a notification register
- Solicitor prep pages and a monthly check-in

"However this job came to you, it can be done gently, and done well."

THE ESTATE OF

____

EXECUTOR / ADMINISTRATOR

____

AUSTRALIAN EDITION

theestateorganiser.com.au

A Word Before You Begin

If you are reading this, someone has died. Perhaps it was expected, perhaps it came out of nowhere. Either way, this job is now yours, at one of the hardest times there is to be handed anything. Maybe you signed up for it, maybe you did not, and maybe you said yes because you wanted to help, without quite understanding how much work it really is.

This book is the working file for that job. It does not lecture, and it does not assume you know what an executor is supposed to do. It gives you one steady place to put everything: every decision, every phone call, every letter, every dollar. On the days your head is too full, the file holds it for you.

Three things before you start

You do not have to do it all today. Very little truly has to happen in the first days, and the first section keeps that list short. Most of this job can move at a walking pace.

You do not have to do it alone. A solicitor for the legal steps, an accountant for the tax, family and friends for the errands. Asking for help is not a failure of duty; it is usually how the job gets done well. And where anything in this book touches law, tax or money, treat it as background only. The professionals advising you know this estate; this book does not.

You will not need all of it. Estates come in every size. Use the sections that fit this one, skip the rest, and let blank pages stay blank without guilt.

How this Companion works

The first two sections give you the shape of the job: what tends to happen in the first days, and what tends to happen over the months that follow. Everything after that is a working log. Decisions go in the diary. People go in the contacts log. Letters go in the correspondence tracker and the notification register. Dollars go in the money log. Questions go in the solicitor pages. Small habits, kept up gently, that turn a chaotic year into a documented one.

If the person who died kept an Estate Organiser, keep it beside this book. It holds their answers; this book holds your work. If they did not, this Companion still walks you through the same ground, one call and one page at a time.

The important fine print

Educational content only. Not legal, financial or tax advice. Estate laws vary across Australian states and territories. Always consult a qualified professional about your specific situation. There is a fuller legal note at the back of this book. It matters, and it is worth a minute of your time.

However you are feeling as you open this book is allowed. Steady is not the same as unmoved. Go gently, and let these pages carry what they can.

Contents

The First Days

The first days are the hardest, and the fullest. There is grief in the house and a list in your hand. This section keeps the list short.

Very few things truly need to happen straight away. The checklist below covers the ones that usually do, in the order most families meet them. Work through it slowly, tick things off as they are done, and write down who is helping with what, so nothing rests on memory alone.

If the person who died kept an Estate Organiser or a letter of wishes, find it early. It was written to hand you answers: where things are, who to call, what was wanted.

The First Days

A short list for the hardest days, so nothing urgent is missed and nothing rests on memory.

IN THE FIRST FEW HOURS

- [ ] Secure the home (lock up, collect mail, arrange care for pets and plants)
- [ ] Contact immediate family
- [ ] Locate the Will, and any Estate Organiser or letter of wishes

IN THE FIRST DAY OR TWO

- [ ] Obtain the Medical Certificate of Cause of Death

> *This is the doctor's certificate that lets funeral arrangements begin. It is not the official death certificate, which usually arrives a few weeks later, after the death is registered. Most banks and institutions will wait for the official one.*

- [ ] Contact a funeral director (check any recorded funeral wishes first)
- [ ] Register the death (your funeral director usually does this; timeframes vary by state, so check with them, and order multiple certificates)
- [ ] Notify the deceased's employer, if they were working
- [ ] Secure valuables and important documents, and note where you put them

IN THE FIRST WEEK

- [ ] Notify close friends and wider family
- [ ] Contact the solicitor, if there is one
- [ ] Contact insurers where a death benefit may apply
- [ ] Arrange ongoing care for dependants
- [ ] Cancel upcoming appointments
- [ ] Start recording everything in this Companion (dates, calls, costs)

The First Days (cont.)

WHO IS HELPING WITH WHAT

TASK	WHO	DONE

NOTES: WHAT IS DONE, AND WHAT STILL NEEDS DOING

The Months Ahead

Settling an estate is a marathon, not a sprint. The work typically runs for six to twelve months, and sometimes longer if the estate is complicated.

That is normal, because banks, courts and government agencies all move at their own pace, and a large part of your job is simply keeping track while you wait. This section gives you the broad shape of the months ahead, then a place to plan your own milestones, because every estate runs to its own clock. The free Executor Toolkit from The Estate Organiser walks through this timeline in more detail if you want the fuller picture. You can get it at theestateorganiser.com.au/toolkit

The Months Ahead

The broad shape of the year, and a place to plan the milestones of this estate.

THE FIRST MONTH

- [ ] Notify the organisations that matter most (banks, super funds, Centrelink if applicable, insurers). The Notification Register in this book tracks each one
- [ ] Work out whether probate is needed (requirements and timeframes vary by state and territory, so check with your solicitor or your state's Supreme Court registry)
- [ ] Make a first list of the assets and the debts
- [ ] Keep urgent bills paid, and record every payment in the Money Log

THE FIRST THREE TO SIX MONTHS

- [ ] Obtain the Grant of Probate, if one is needed
- [ ] Open an estate bank account, and keep estate money separate from your own
- [ ] Collect the assets, and deal with property as the Will directs
- [ ] Identify the debts, and take advice on the correct order before paying them
- [ ] Arrange the final tax return (the ATO publishes guidance for deceased estates, and an accountant can handle it)
- [ ] Keep beneficiaries informed as you go (the update log in this book makes it easy)

TOWARDS THE END

- [ ] Prepare the estate accounts
- [ ] Prepare the distribution plan and share it with beneficiaries
- [ ] Distribute the estate, then close the estate account
- [ ] Keep the records somewhere safe (they are your protection if questions come later)

The Months Ahead (cont.)

YOUR OWN MILESTONES

> *Every estate runs to its own clock. Plan the milestones that apply to this one, with your own target dates.*

MILESTONE	TARGET	DATE DONE	NOTES

NOTES: PROGRESS, DATES, AND ANYTHING OUTSTANDING

Pitfalls to Avoid

Most executor trouble comes from a handful of avoidable habits, not from bad intent. Mixing money, moving too fast, keeping thin records, going quiet on the family.

The free Executor Toolkit explains each of these pitfalls in detail. Here they are as a working list: read them early, tick each one once you know how you will avoid it, and come back to this page whenever something feels off.

Pitfalls to Avoid

The habits that catch executors out, as a working checklist.

PITFALLS TO UNDERSTAND AND AVOID

> *Tick each pitfall once you know how you will avoid it in this estate.*

- [ ] 1. Distributing assets too soon (wait for ATO clearance and the creditor period)
- [ ] 2. Not keeping detailed records
- [ ] 3. Paying debts in the wrong order
- [ ] 4. Mixing personal and estate funds
- [ ] 5. Acting without probate when it's required
- [ ] 6. Ignoring or delaying communication with beneficiaries
- [ ] 7. Taking on too much alone
- [ ] 8. Selling assets too quickly (or too slowly)
- [ ] 9. Not advertising for creditors
- [ ] 10. Paying themselves without documentation
- [ ] 11. Assuming the Will is clear when it's not
- [ ] 12. Not dealing with digital assets
- [ ] 13. Letting family pressure influence decisions
- [ ] 14. Not valuing assets properly
- [ ] 15. Missing tax deadlines
- [ ] 16. Not understanding superannuation
- [ ] 17. Underestimating how long it takes

NOTES: WHICH OF THESE COULD APPLY TO THIS ESTATE, AND HOW YOU'LL HANDLE THEM

The Decisions Diary

Executors make decisions for months. What to sell and when. Who to hire. What to pay and what to query. Later, people may ask why you chose what you chose. That is normal too, and it is far easier to answer with a diary than with a memory.

Each time you make a meaningful decision, give it a few lines here: what you decided, why, and who agreed or was consulted at the time. Written down on the day, this becomes a quiet record that protects you, keeps the family conversation honest, and makes the final accounts far easier to prepare.

The Decisions Diary

A dated record of every meaningful decision: what, why, and who agreed.

DECISION 1

DATE

WHAT THE DECISION WAS ABOUT

WHAT I DECIDED, AND WHY

WHO AGREED OR WAS CONSULTED

FOLLOW-UP NEEDED

DECISION 2

DATE

WHAT THE DECISION WAS ABOUT

WHAT I DECIDED, AND WHY

WHO AGREED OR WAS CONSULTED

FOLLOW-UP NEEDED

The Decisions Diary (cont.)

DECISION 3

DATE

WHAT THE DECISION WAS ABOUT

WHAT I DECIDED, AND WHY

WHO AGREED OR WAS CONSULTED

FOLLOW-UP NEEDED

DECISION 4

DATE

WHAT THE DECISION WAS ABOUT

WHAT I DECIDED, AND WHY

WHO AGREED OR WAS CONSULTED

FOLLOW-UP NEEDED

DECISION 5

DATE

WHAT THE DECISION WAS ABOUT

The Decisions Diary (cont.)

WHAT I DECIDED, AND WHY

WHO AGREED OR WAS CONSULTED

FOLLOW-UP NEEDED

DECISION 6

DATE

WHAT THE DECISION WAS ABOUT

WHAT I DECIDED, AND WHY

WHO AGREED OR WAS CONSULTED

FOLLOW-UP NEEDED

DECISION 7

DATE

WHAT THE DECISION WAS ABOUT

WHAT I DECIDED, AND WHY

The Decisions Diary (cont.)

WHO AGREED OR WAS CONSULTED

FOLLOW-UP NEEDED

DECISION 8

DATE

WHAT THE DECISION WAS ABOUT

WHAT I DECIDED, AND WHY

WHO AGREED OR WAS CONSULTED

FOLLOW-UP NEEDED

DECISION 9

DATE

WHAT THE DECISION WAS ABOUT

WHAT I DECIDED, AND WHY

WHO AGREED OR WAS CONSULTED

FOLLOW-UP NEEDED

The Decisions Diary (cont.)

DECISION 10

DATE

WHAT THE DECISION WAS ABOUT

WHAT I DECIDED, AND WHY

WHO AGREED OR WAS CONSULTED

FOLLOW-UP NEEDED

DECISION 11

DATE

WHAT THE DECISION WAS ABOUT

WHAT I DECIDED, AND WHY

WHO AGREED OR WAS CONSULTED

FOLLOW-UP NEEDED

DECISION 12

DATE

WHAT THE DECISION WAS ABOUT

The Decisions Diary (cont.)

WHAT I DECIDED, AND WHY

WHO AGREED OR WAS CONSULTED

FOLLOW-UP NEEDED

NOTES: SMALLER DECISIONS, AND ANYTHING STILL BEING WEIGHED UP

People and Conversations

You are about to deal with more organisations than you thought possible. Names, reference numbers and half-finished phone calls pile up fast.

Two logs live here. The first records every person and organisation you deal with, so you are not left hunting for a number twice. The second tracks correspondence: what was sent, what came back, and what is still waiting on a reply. A follow-up habit is an executor's best friend. If you have heard nothing in two weeks, chase it.

People and Conversations

Every contact and every letter, logged once and findable forever.

CONTACTS MADE

NAME	ORGANISATION / ROLE	PHONE / EMAIL	REFERENCE NO.

People and Conversations (cont.)

NAME	ORGANISATION / ROLE	PHONE / EMAIL	REFERENCE NO.

CORRESPONDENCE TRACKER

> *Log everything you send and receive. Follow up if you have not heard back within two weeks.*

DATE	WITH	HOW	ABOUT	REPLY DUE	DONE

People and Conversations (cont.)

DATE	WITH	HOW	ABOUT	REPLY DUE	DONE

People and Conversations (cont.)

DATE	WITH	HOW	ABOUT	REPLY DUE	DONE

NOTES: CALLS TO MAKE, AND WHO STILL OWES YOU AN ANSWER

Notifications and Templates

After a death, dozens of organisations need to be told, usually in writing.

The templates on the following pages give you words to start from. Adapt each one with the details of the estate, and keep a copy of everything you send.

Then use the register at the end of this section to track every notification: who has been told, when, and who still owes you a reply.

TEMPLATE 1: NOTIFICATION TO BANK

[Your Name]
[Your Address]
[Your Phone]
[Your Email]

[Date]

[Bank Name]
[Branch Address]

Dear Sir/Madam,

Re: Notification of Death - [Deceased's Full Name]

I am writing to notify you of the death of [Deceased's Full Name], who passed away on [Date of Death].

[Deceased's Name] held the following account(s) with your organisation:
- Account Name: [Account Name]
- Account Number: [Account Number]
- BSB: [BSB]

I am the executor of the estate of [Deceased's Name]. A certified copy of the death certificate is enclosed.

Please advise me of the balance(s) as at the date of death and let me know what happens to each account now. I understand that accounts held in the deceased's sole name are usually frozen until probate, while jointly held accounts generally pass to the surviving account holder. Please confirm how each account is held and what steps you need from me. I will provide a copy of the Grant of Probate once it has been issued, if probate is required for this estate. Not every estate needs a Grant of Probate. Whether you need one depends on the size of the estate and how the assets are held, so check with the bank or a solicitor before applying.

Please also advise if there are any:
- Direct debits or automatic payments linked to this account
- Joint account holders
- Loans, credit cards, or other products in the deceased's name

I would appreciate your response within 14 days.

Yours faithfully,

[Your Signature]
[Your Printed Name]
Executor for the Estate of [Deceased's Full Name]
Enclosures: Certified copy of death certificate

TEMPLATE 2: NOTIFICATION TO SUPERANNUATION FUND

[Your Name]
[Your Address]
[Your Phone]
[Your Email]

[Date]

[Super Fund Name]
[Super Fund Address]

Dear Sir/Madam,

Re: Death Benefit Claim - [Deceased's Full Name]
Member Number: [Member Number]

I am writing to notify you of the death of [Deceased's Full Name], who passed away on [Date of Death].

[Deceased's Name] was a member of your superannuation fund. A certified copy of the death certificate is enclosed.

Please send me:
1. A death benefit claim form
2. Details of the current superannuation balance
3. Information about any binding or non-binding death benefit nomination on file
4. Details of any insurance held through the fund (life insurance, TPD, income protection)

I am the executor of the estate. Please advise what documentation you require to process the death benefit claim.

I would appreciate your response within 14 days.

Yours faithfully,

[Your Signature]
[Your Printed Name]
Executor for the Estate of [Deceased's Full Name]

Enclosures: Certified copy of death certificate

TEMPLATE 3: NOTIFICATION TO CENTRELINK

[Your Name]
[Your Address]
[Your Phone]

[Date]

Centrelink
[Local Centrelink Office Address]

Dear Sir/Madam,

Re: Notification of Death - [Deceased's Full Name]
Centrelink Reference Number (CRN): [CRN]

I am writing to notify you of the death of [Deceased's Full Name], who passed away on [Date of Death].

[Deceased's Name] was receiving the following payment(s):
- [Payment Type, e.g., Age Pension, Carer Payment]

A certified copy of the death certificate is enclosed.

Please cease all payments with effect from [Date of Death] and advise if any payments received after this date need to be repaid.

[If applicable: The deceased's spouse, [Spouse's Name], CRN [Spouse's CRN], may be eligible for bereavement payments. Please advise them of any entitlements.]

Please confirm receipt of this notification and advise of any further action required.

Yours faithfully,

[Your Signature]
[Your Printed Name]
Executor for the Estate of [Deceased's Full Name]

Enclosures: Certified copy of death certificate

TEMPLATE 4: NOTIFICATION TO EMPLOYER

[Your Name]
[Your Address]
[Your Phone]
[Your Email]

[Date]

[Employer Name]
[HR Department]
[Employer Address]

Dear Sir/Madam,

Re: Notification of Death - [Deceased's Full Name]
Employee Number: [Employee Number]

I am writing to notify you of the death of [Deceased's Full Name], who was employed by your organisation as [Job Title]. [He/She] passed away on [Date of Death].

A certified copy of the death certificate is enclosed.

As the executor of [Deceased's Name]'s estate, I request the following:

1. Final pay for any unpaid salary or wages
2. Payment of accrued annual leave and long service leave
3. Details of any superannuation contributions owing
4. Information about any life insurance or income protection policies through the employer
5. Details of any other entitlements (redundancy, bonuses, share options, etc.)

Please advise what documentation you require and the expected timeframe for payment of final entitlements.

Please send all correspondence to the address above.

Yours faithfully,

[Your Signature]
[Your Printed Name]
Executor for the Estate of [Deceased's Full Name]

Enclosures: Certified copy of death certificate

TEMPLATE 5: NOTIFICATION TO INSURANCE COMPANY

[Your Name]
[Your Address]
[Your Phone]
[Your Email]

[Date]

[Insurance Company Name]
[Claims Department]
[Insurance Company Address]

Dear Sir/Madam,

Re: Life Insurance Death Claim - [Deceased's Full Name]
Policy Number: [Policy Number]

I am writing to notify you of the death of [Deceased's Full Name], the insured person under the above policy. [He/She] passed away on [Date of Death].

A certified copy of the death certificate is enclosed.

I am the executor of the estate of [Deceased's Name]. Please send me:
1. A claim form for the death benefit
2. Confirmation of the sum insured
3. Details of the nominated beneficiaries (if any)
4. A list of documents required to process the claim

Please advise the expected timeframe for processing this claim.

I would appreciate your response within 14 days.

Yours faithfully,

[Your Signature]
[Your Printed Name]
Executor for the Estate of [Deceased's Full Name]

Enclosures: Certified copy of death certificate

TEMPLATE 6: NOTIFICATION TO UTILITY PROVIDER

[Your Name]
[Your Address]
[Your Phone]

[Date]

[Utility Provider Name]
[Utility Provider Address]

Dear Sir/Madam,

Re: Notification of Death and Account Closure - [Deceased's Full Name]
Account Number: [Account Number]
Service Address: [Service Address]

I am writing to notify you of the death of [Deceased's Full Name], who passed away on [Date of Death].

[Deceased's Name] held an account with your organisation for [electricity/gas/water/internet] service at the above address.

Please:
1. Transfer the account to my name as executor until the property is sold
OR
2. Close the account as of [Date] and send a final bill to the address below

Please send the final account statement and any refund owing to:
[Your Name]
[Your Address]

Yours faithfully,

[Your Signature]
[Your Printed Name]
Executor for the Estate of [Deceased's Full Name]

TEMPLATE 7: NOTIFICATION TO COUNCIL (RATES)

[Your Name]
[Your Address]
[Your Phone]

[Date]

[Council Name]
Rates Department
[Council Address]

Dear Sir/Madam,

Re: Notification of Death - [Deceased's Full Name]
Property Address: [Property Address]
Assessment Number: [Assessment Number]

I am writing to notify you of the death of [Deceased's Full Name], who was the owner of the above property. [He/She] passed away on [Date of Death].

I am the executor of the estate. A certified copy of the death certificate is enclosed.

Please update your records and send all future correspondence regarding this property to:
[Your Name]
[Your Address]

Please advise if there are any outstanding rates owing.

Yours faithfully,

[Your Signature]
[Your Printed Name]
Executor for the Estate of [Deceased's Full Name]

Enclosures: Certified copy of death certificate

TEMPLATE 8: GENERAL NOTIFICATION LETTER

[Your Name]
[Your Address]
[Your Phone]
[Your Email]

[Date]

[Organisation Name]
[Organisation Address]

Dear Sir/Madam,

Re: Notification of Death - [Deceased's Full Name]
Account/Reference Number: [Number]

I am writing to notify you of the death of [Deceased's Full Name], who passed away on [Date of Death].

[Deceased's Name] held an account/membership/subscription with your organisation. A certified copy of the death certificate is enclosed.

Please:
1. Close the account/cancel the membership/subscription
2. Advise if there are any outstanding payments or refunds owing
3. Update your records to prevent further correspondence

Please send any final statements or refunds to:
[Your Name]
[Your Address]

Yours faithfully,

[Your Signature]
[Your Printed Name]
Executor for the Estate of [Deceased's Full Name]

Enclosures: Certified copy of death certificate

TIPS FOR USING THESE TEMPLATES

• Always include a certified copy of the death certificate
• Keep a copy of every letter you send
• Record the date sent and follow up if no response within 2 weeks
• Use registered post for important notifications
• Be clear about what you're requesting
• Include your contact details
• Be patient - some organisations take longer to respond than others

Notifications and Templates

Letters to adapt, and a register of who has been told.

WHO USUALLY NEEDS TO KNOW

- [ ] Money: banks, super funds, life and health insurers
- [ ] Government: Centrelink or DVA if applicable, Medicare, the ATO (often via the accountant), the Electoral Commission
- [ ] The home: council, electricity, gas and water, internet and phone, home and car insurers
- [ ] Everyday life: employer, subscriptions, memberships, roadside assistance, Australia Post mail redirection

THE NOTIFICATION REGISTER

> *Log each notification and follow up if you don't hear back within 2 weeks.*

ORGANISATION	DATE NOTIFIED	SENT BY	RESPONSE RECEIVED	FOLLOW-UP

Notifications and Templates (cont.)

ORGANISATION	DATE NOTIFIED	SENT BY	RESPONSE RECEIVED	FOLLOW-UP

Notifications and Templates (cont.)

NOTES

The Money Log

You will spend money on behalf of the estate. Funeral costs, death certificates, valuations, postage, travel, professional fees. Some of it may come out of your own pocket before an estate account even exists.

Executors can usually be reimbursed from the estate for reasonable out-of-pocket expenses, but the paper trail is what makes that smooth and beyond question. So record every dollar here, on the day it moves. Note whether it was paid personally or from the estate account, and keep every receipt. Money coming into the estate gets its own log too, so the final accounts add up the first time.

The Money Log

Every dollar out and in, recorded on the day, so the accounts are clean and defensible.

ESTATE DETAILS

ESTATE OF

EXECUTOR NAME

DATE ESTATE OPENED

ESTATE BANK ACCOUNT (BANK AND REFERENCE)

EXPENSE LOG

> *Record every expense. Note whether you paid it personally (to be reimbursed) or from the estate account. Keep all receipts.*

DATE	DESCRIPTION	PAYEE	AMOUNT	PAID FROM	RECEIPT

The Money Log (cont.)

DATE	DESCRIPTION	PAYEE	AMOUNT	PAID FROM	RECEIPT

The Money Log (cont.)

DATE	DESCRIPTION	PAYEE	AMOUNT	PAID FROM	RECEIPT

The Money Log (cont.)

DATE	DESCRIPTION	PAYEE	AMOUNT	PAID FROM	RECEIPT

The Money Log (cont.)

DATE	DESCRIPTION	PAYEE	AMOUNT	PAID FROM	RECEIPT

The Money Log (cont.)

DATE	DESCRIPTION	PAYEE	AMOUNT	PAID FROM	RECEIPT

MONEY INTO THE ESTATE

> *Record money the estate receives: account closures, insurance payments, sale proceeds, refunds.*

DATE	FROM / SOURCE	AMOUNT	BANKED TO	NOTES

The Money Log (cont.)

DATE	FROM / SOURCE	AMOUNT	BANKED TO	NOTES

REIMBURSEMENTS TO ME

DATE	WHAT FOR	AMOUNT	REPAID ON

The Money Log (cont.)

DATE	WHAT FOR	AMOUNT	REPAID ON

TOTALS AND NOTES

Questions for the Solicitor

Professional time is often billed by the hour, so a prepared list works in your favour. Arriving with your questions written down can turn three scattered phone calls into one useful meeting.

Write questions down as they occur to you, take the list to each meeting, and record the answer in plain words while it is fresh. Some starting points executors often ask about:

- Is probate needed for this estate, and what does the process look like in this state?
- What debts should be paid, and in what order?
- Is there anything I should not do yet, such as distributing early?
- What are the estate's tax obligations, and who will handle the final return?
- How long is this likely to take, and what could slow it down?
- What can I be reimbursed for, and how should I document it?

Questions for the Solicitor

A prep page for every professional meeting, so nothing gets forgotten or asked twice.

QUESTIONS AND ANSWERS

> *Before each meeting: bring the death certificate, the Will, your list of assets and debts, and this Companion.*

MY QUESTION	THE ANSWER, IN SHORT	DATE

Questions for the Solicitor (cont.)

MY QUESTION	THE ANSWER, IN SHORT	DATE

MEETING NOTES

ADVICE RECEIVED, AND WHAT HAPPENS NEXT

Keeping People Informed

Estates move slowly, and silence is where worry starts. Beneficiaries who hear nothing for months tend to fear the worst, and strained families can strain further.

A short, regular update works wonders: what has been done, what is being waited on, what happens next. You do not need to share every detail or answer every demand on the spot. People just need to know the estate is moving and that they have not been forgotten. Log each update here, so you can see at a glance who was told what, and when.

Keeping People Informed

A simple rhythm of updates, and a log of who was told what.

UPDATE RHYTHM

I PLAN TO UPDATE PEOPLE EVERY	NEXT UPDATE DUE

UPDATES SENT

DATE	WHO	WHAT I TOLD THEM	HOW

Keeping People Informed (cont.)

DATE	WHO	WHAT I TOLD THEM	HOW

NOTES: QUESTIONS PEOPLE HAVE ASKED, AND PROMISES MADE

The Monthly Check-In

Once the urgent weeks pass, an estate is finished by rhythm, not by heroics. A short monthly sit-down with this Companion keeps things from drifting.

Run the same sweep each month: what moved, what is stuck, who owes you a reply, what money moved, what happens next. Twenty minutes, then put it down again until next month.

The Monthly Check-In

A twenty-minute monthly sweep that keeps the estate moving.

EACH CHECK-IN, RUN THE SAME SWEEP

- [ ] Estate bills current, and every cost recorded in the Money Log
- [ ] Correspondence tracker reviewed, and overdue replies chased
- [ ] Decisions since last month written into the Decisions Diary
- [ ] Beneficiaries updated, or the next update scheduled
- [ ] Upcoming deadlines (court, tax, insurance) noted in the log below

CHECK-IN LOG

MONTH	WHERE THINGS STAND	WHAT HAPPENS NEXT	NEEDS CHASING

The Monthly Check-In (cont.)

MONTH	WHERE THINGS STAND	WHAT HAPPENS NEXT	NEEDS CHASING

NOTES

When the Work Is Done

One day, sooner than it feels possible right now, the last transfer will clear and the last letter will be filed. This page is for that day.

Run the final sweep below, note where the records are kept, and let the job be finished. Then do one more thing, not as an executor but as a person: take a breath. You have carried something heavy on behalf of someone who trusted you with it, and you carried the family's questions at the same time. That counts for a great deal.

When the Work Is Done

The final sweep, and a record of where everything ended up.

THE FINAL SWEEP

- [ ] Estate distributed as the Will directs
- [ ] Final estate accounts prepared and shared
- [ ] Estate bank account closed
- [ ] Records stored somewhere safe, with this Companion kept alongside them
- [ ] Anyone holding paperwork for the estate told where the records now live

WHERE EVERYTHING ENDED UP

DATE THE ESTATE WAS FINALISED

WHERE THE RECORDS ARE KEPT

FINAL NOTES: ANYTHING A FUTURE READER OF THIS FILE SHOULD KNOW

Important Legal Information

Educational content only. Not legal, financial or tax advice. Estate laws vary across Australian states and territories. Always consult a qualified professional about your specific situation.

What this Companion is

The Executor's Companion is an information and record-keeping tool for people administering a deceased estate in Australia. It provides general educational information and structured places to record what you do. That is all it does.

What this Companion is not

This Companion is NOT:

- Legal advice, financial advice or tax advice
- A substitute for a solicitor, accountant or other qualified professional
- A legally binding document of any kind
- A complete statement of an executor's or administrator's legal duties

Laws vary and change

Estate administration, probate and related laws differ across Australian states and territories, and they change over time. The checklists and timelines in this book are general guides only, and the requirements for the estate you are administering may differ. Confirm anything that matters with a qualified professional in the relevant state or territory, or with the official body concerned, for example the Australian Taxation Office for tax matters or the probate registry of the relevant state or territory Supreme Court for probate.

Your responsibility

Acting as an executor or administrator carries personal legal responsibilities. Using this Companion does not discharge those responsibilities, and following a general checklist is not a defence to getting something wrong. Where money, tax, property or a dispute is involved, professional advice is strongly recommended before you act.

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