



Executor Checklist (Part 1)

A tool designed to help estate executors identify some of the major tasks associated with their role.

(See disclaimer below.)

- This is Part 1 of a checklist to assist the Executor of an estate with tasks relevant to probate.
- Part 2 (tasks post-probate) is available upon request from a licensed Now Sorted user.

Executor ID	
First name: _____	Family name: _____
T/M: _____	E: _____@_____com.au

PRIOR TO PROBATE BEING GRANTED	DONE	NOT APPLICABLE
1. Discuss funeral arrangements for deceased as required.	<input type="checkbox"/>	<input type="checkbox"/>
2. Locate the will.	<input type="checkbox"/>	<input type="checkbox"/>
3. Note any special instructions.	<input type="checkbox"/>	<input type="checkbox"/>
4. After the funeral, meet the deceased's accountant, and the solicitor representing the estate, to discuss specific responsibilities on estate issues.	<input type="checkbox"/>	<input type="checkbox"/>
5. Obtain the death certificate.	<input type="checkbox"/>	<input type="checkbox"/>
6. File claims for life insurance payable to the estate.	<input type="checkbox"/>	<input type="checkbox"/>
7. Examine all policies of insurance on real estate and personal property; have policies endorsed to the estate and coverage increased where needed.	<input type="checkbox"/>	<input type="checkbox"/>
8. Source invoice and give effect to payment for funeral.	<input type="checkbox"/>	<input type="checkbox"/>
9. Check with health insurer for any 'funeral benefits'.	<input type="checkbox"/>	<input type="checkbox"/>
10. If the deceased was drawing a government pension, advise authorities to cease payments.	<input type="checkbox"/>	<input type="checkbox"/>
11. If necessary, notify post office to forward mail.	<input type="checkbox"/>	<input type="checkbox"/>
12. If required, discontinue telephone service and other utilities.	<input type="checkbox"/>	<input type="checkbox"/>
13. Identify and inspect properties, and secure as required.	<input type="checkbox"/>	<input type="checkbox"/>
14. Study leases and mortgages.	<input type="checkbox"/>	<input type="checkbox"/>
15. Search for assets, including superannuation, and nominations as beneficiaries, if any.	<input type="checkbox"/>	<input type="checkbox"/>
16. Assemble supporting data and estimate value of assets in the estate.	<input type="checkbox"/>	<input type="checkbox"/>
17. List contents of all safe-deposit boxes.	<input type="checkbox"/>	<input type="checkbox"/>
18. Have assets appraised by qualified appraiser where legally required.	<input type="checkbox"/>	<input type="checkbox"/>
19. If necessary, obtain asset values for Capital Gains Tax purposes at date of death.	<input type="checkbox"/>	<input type="checkbox"/>
20. Gather information about the deceased's financial affairs for the years immediately before his or her death; make a comprehensive study of any business interest that may be included in the estate.	<input type="checkbox"/>	<input type="checkbox"/>
21. Identify deceased's creditors, mortgagees, and establish quantum of debts.	<input type="checkbox"/>	<input type="checkbox"/>

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Disclaimer

Now Sorted Pty Ltd
does not provide any legal advice
and users of this document should consult
with a qualified legal practitioner.

Executor Checklist (Part 1)

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- We recommend discussing this checklist with a qualified legal practitioner.
- There is space for Executor notes at the bottom of this page..

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DONE **NOT APPLICABLE**

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|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|--------------------------|
| 22. Identify the status of any guarantees given by the deceased. | <input type="checkbox"/> | <input type="checkbox"/> |
| 23. Determine if a tax file number (TFN) is required for the estate. | <input type="checkbox"/> | <input type="checkbox"/> |
| 24. If TFN for estate is required, determine who should organise after probate. | <input type="checkbox"/> | <input type="checkbox"/> |
| 25. Study any employment contract or deferred compensation arrangements that the deceased may have had to determine if payments due to estate. | <input type="checkbox"/> | <input type="checkbox"/> |
| 26. Solicitor to publish notice in local paper that application for probate will be sought. | <input type="checkbox"/> | <input type="checkbox"/> |
| 27. Ascertain whether all or some portion of jointly owned property with the right of survivorship is to be included in the deceased's gross estate for CGT purposes or any CGT consequences. | <input type="checkbox"/> | <input type="checkbox"/> |
| 28. Determine whether any trust created by the deceased is to be included in the estate (and, if so, find relevant documents, including trust deed). | <input type="checkbox"/> | <input type="checkbox"/> |
| PROBATE | | |
| 29. Apply to Supreme Court for Probate with documents such as affidavit of Assets & Liabilities and Summons. | <input type="checkbox"/> | <input type="checkbox"/> |

PLEASE NOTE:

Part 2 of this checklist is available free to licensed users of Now Sorted.

To obtain your copy, please email: service@nowsorted.com

Executor Notes

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