

# Executor CHECKLIST

Your role as an Executor of a Will is an important and responsible one.

Below is a checklist of tasks that you may need to carry out when you have been appointed as an Executor. It is provided as guidance only and we recommend that you discuss the administration of the estate with our Estate Planning team as soon as you have been appointed as an Executor.

**!** In the event that the funeral has not been pre-planned or the Will does not provide for the funeral, the Executor has the responsibility of planning the funeral.

## Immediately after death

THE WILL	Checked (tick)
Locate and review the original Will and Codicils	
Ascertain who the appointed Executors are	
Check for any funeral wishes made known by the deceased	
Identify guardian of children (where applicable)	
Identify care arrangements for pets	

THE FUNERAL	Checked (tick)
Plan funeral and confirm with the deceased's family members (if not pre-planned)	
Arrange for death notification to be placed into paper (if appropriate)	
Arrange for funeral director to order death certificate	
Attend to payment of the funeral account from the deceased's bank account, prior to the expiration of any discount period	

## Within days of death

ASSETS OF THE DECEASED	Checked (tick)
Freeze all bank accounts owned by the deceased	
Identify, secure and take control of all the deceased's assets, including digital assets	
Identify and prepare an itemised list of all liabilities	
Verify that adequate insurance for property and valuables is in place	
Cancel all credit cards	
Detail all outstanding debts owing by the deceased	
Redirect the deceased's mail with Australia Post	
Notify Centrelink, utilities, professional advisors and insurance companies of the deceased's death	
Notify all other parties that were affiliated with the deceased, including landlord / tenants, agents and employers or employees	

SEEK PROFESSIONAL ADVICE	Checked (tick)
Contact the Beck Legal Estate Administration team to discuss the ongoing administration of the estate	
Apply and obtain a Grant of Probate (where necessary)	
Meet with the deceased's accountant to determine any tax liabilities and to establish whether there is any capital gains tax to be paid	

**!** It is the responsibility of the Executor for ensuring that the assets of the estate are protected and do not diminish. Ensure that the property is secured, spare keys are located and that the assets are properly insured.

**!** Whilst Beck Legal will assist you with locating assets, it is important to ensure that you act quickly when notifying relevant parties.

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## Within months of death: administer and finalise the distribution of the estate

! Beck Legal will provide you with ongoing assistance in the administration and distribution of the estate assets.

ADMINISTER THE DECEASED'S ESTATE	Checked (tick)
Redeem and call in assets of the estate	
Notify beneficiaries of their interests	
Arrange for property to be sold (if applicable)	
Arrange for property to be vacated (if applicable)	
DISTRIBUTE AND FINALISE THE ADMINISTRATION OF THE ESTATE	Checked (tick)
Attend to lodging final tax returns (where appropriate)	
Deliver gifts or assets to specific beneficiaries or charities	
Distribute estate in accordance with the terms of the Will	

## Notifications

As a helpful guide, you may need to notify some or all of the following organisations following the death of a loved one.

	Checked (tick)
Accountant	
Australian Taxation Office	
Banks / Building Society / Credit Unions	
Centrelink	
Chemist	
Church or Religious organisations	
Clubs (sporting or otherwise)	
Credit card providers	
Dentist	
Department Veterans Affairs	
Doctor, Specialist or Hospital	
Electoral Office	
Employer	

### HOME SERVICES

Gardening	
Household assistance	
Meals on Wheels	
Medical appliance rental	
Newsagent	
Nursing	
Safetylink	

INSURANCE COMPANIES	Checked (tick)
Accident / Life	
Funeral bond	
Home & contents	
Motor vehicle / caravan / boat / trailer	
Private Health insurance	
Loan companies	
Medicare	
Optometrist	
Post office – re direction of mail	
Service organisations – Rotary, Lions, Apex, Red Cross	
Superannuation Fund	
Share Company	
Trades Union or Professional Associations	

### UTILITY SERVICE PROVIDERS

Electricity	
Gas	
Telephone	
Vic Roads – vehicle registrations / cancellation of driver's licence	