

## Checklist of First Steps for Executors

The following is not a complete list of the initial responsibilities of an executor or personal representative in Florida, but it does list some of the tasks that may need to be undertaken, some even before appointment by the court. Some initial decisions (such as organ or tissue donation and disposition of the body, and providing for pets) normally will be made by the next-of-kin as opposed to the executor (called personal representative in Florida).

- Make all funeral or cremation arrangements (if necessary).
- Order certified copies of death certificates through funeral home. Get at least two without cause of death if died in Florida.
- Secure the decedent's property (house, apartment, car) and confirm property insurance in force. Consider changing locks, adding security system to residence, and storing vehicles if risk of theft perceived.
- Review and secure all records of the decedent (assets, debts, business, family). Make backup copies of the most important, store records in safe place.
- Examine checking account records for automatic withdrawals.
- Set up filing system for estate records.
- Redirect mail, usually by forwarding mail, and cancel any subscriptions.
- Notify Social Security (if funeral home has not) and pension plans of the death.
- Cancel all credit cards and charge accounts; inquire as to credit life insurance.
- Secure all debit/ ATM cards.
- Find the most recent Will and have it deposited into the Probate court. If mailing, use tracking method and be sure "disinterested witnesses" have copies and have compared to original.
- Access the safe deposit box and inventory the contents, if possible. A court order may be needed.
- Research Florida probate law process.
- Research and interview possible probate attorneys.
- Discuss fee options up front. Look for insurance policies and notify beneficiaries under those policies of the name and address of insurance company. If named beneficiary predeceased the insured, often the estate of the insured is the beneficiary.