

A loved one has passed; I am an Executor – WHAT DO I DO NEXT?

We understand that the loss of a loved one is overwhelming. This page is meant to help you focus on the **essential steps** in the days immediately following a death - and to remind you that **many legal and financial matters** can wait. It's normal for an estate to take **about a year or more** to fully administer. Don't feel pressure to rush - many steps take time and unfold gradually.

✓ Immediate Essentials (First Few Days)

☐ Obtain a Death Certificate

Usually handled by the funeral home. They will typically provide you with 10 originals of the **Death Certificate** (not a copy). Nothing can proceed without this document.

☐ Make Funeral or Cremation Arrangements

If possible, follow the wishes of the deceased.

☐ Secure the Home & Valuables

Ensure the home is secure, insured and any pets, mail, or valuables are taken care of.

☐ Notify Close Family and Friends

This can be emotionally difficult - lean on support where possible.

There's No Rush – It's Ok to Wait on These Items

☐ Probate or Legal Steps

You do *not* need to go to a lawyer or file for probate immediately. In most cases, you are afforded time to begin these processes.

☐ Bank Accounts and Bills

You are not personally responsible for the deceased's debts. Financial institutions will not take action right away.

☐ Distributing Belongings

Please **wait** before giving away or selling personal items. The Will (if one exists) may specify how they should be handled.

♥ When You're Ready, We're Here for You

Once you've had time to grieve and gather documents, reach out to me. I will meet with you to guide you through the next steps and provide you with an Executor Kit that includes a checklist and other helpful information.

Contact:

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