Executor Estate Organizer

Printable worksheets for executors, personal representatives, and families gathering estate records.

HOW TO USE THIS ORGANIZER

Start with the task checklist. Fill out the sections that apply, and print extra copies of any worksheet you need. Keep the completed organizer in a secure place.

Estate details	Write here
Estate of	
Prepared by	
Date last updated	
Attorney or primary contact	

WORKSHEET INDEX

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For organization and general education. Ask your attorney or tax professional about legal or tax decisions for the estate.

Everybody needs a *"Guy"*

Executor Task Checklist

Use this page as a quick overview. Confirm priorities and timing with the estate attorney.

IMMEDIATE TASKS

Done	Task	Notes / date
☐	Locate the original will.	
☐	Obtain certified copies of the death certificate.	
☐	Notify family members.	
☐	Contact the estate attorney.	
☐	Secure the home, vehicles, and valuables.	

NEXT STEPS

Done	Task	Notes / date
☐	Notify banks and financial institutions.	
☐	Review subscriptions and decide which utilities to keep active.	
☐	Contact insurers and file claims as appropriate.	
☐	Start the estate asset inventory.	

FINAL STEPS

Done	Task	Notes / date
☐	Review debts and taxes with the estate advisors.	
☐	Coordinate asset distributions with the estate attorney.	
☐	Close accounts when appropriate.	

NOTES AND FOLLOW-UP

First 30 Days Checklist

Use the time windows to organize follow-up. Confirm deadlines and priorities with your advisors.

FIRST 7 DAYS / IMMEDIATE PRIORITIES

Done	Task	Notes / date
☐	Request certified copies of the death certificate.	
☐	Notify close family and friends.	
☐	Contact the funeral home if applicable.	
☐	Review the organizer and locate important documents.	
☐	Notify the employer if applicable.	
☐	Secure the home, vehicles, and valuables.	
☐	Locate the will and contact the executor or attorney.	
☐	Review known funeral and final wishes.	

DAYS 8-14 / NEXT STEPS

Done	Task	Notes / date
☐	Contact banks and financial institutions.	
☐	Contact relevant insurance companies.	
☐	Confirm whether Social Security has been notified.	
☐	Contact credit card companies.	
☐	Review urgent bills with the estate representative.	
☐	Arrange mail forwarding or a mail hold as appropriate.	
☐	Contact utility companies and confirm needed services.	
☐	Arrange care for any pets.	

NOTES AND FOLLOW-UP

First 30 Days Checklist

Days 15-30 and follow-up. Take one step at a time and ask for help when you need it.

DAYS 15-30 / ONGOING TASKS

Done	Task	Notes / date
☐	Coordinate estate administration with the executor and attorney.	
☐	Identify beneficiaries and confirm how to notify them.	
☐	Review subscriptions and memberships.	
☐	Identify digital accounts that need attention.	
☐	Contact a financial advisor or accountant if needed.	
☐	Confirm tax filing responsibilities and deadlines.	
☐	Inventory assets and important belongings.	
☐	List remaining tasks and who will handle each one.	

ADDITIONAL NOTES AND NEXT CALLS

Estate Asset Inventory

Record what you find and where supporting records are kept.

Asset	Institution / location	Account last 4	Estimated value	Notes

Common entries include real estate, vehicles, bank accounts, retirement accounts, and investments.

NOTES AND FOLLOW-UP

Important Contacts

Keep contact details for family members and the professionals helping with the estate.

Name	Role / relationship	Phone	Email	Notes

Examples include the attorney, accountant, financial advisor, and insurance agent.

NOTES AND FOLLOW-UP

Account Access Tracker

Record who to contact and where access instructions are kept.

Website / service	Account / username	Secure record location	Support contact	Notes

Keep passwords, PINs, and security answers in a separate secure record.

NOTES AND FOLLOW-UP

Important Document Checklist

Mark each item when located and record where the original or copy is stored.

Document	Location	Found	Notes
Will		☐	
Trust documents		☐	
Insurance policies		☐	
Property deeds		☐	
Vehicle titles		☐	
Bank statements		☐	
Investment records		☐	
Retirement account records		☐	
Tax returns		☐	
Bills and debts list		☐	
Birth certificates		☐	
Marriage certificate		☐	
Death certificate		☐	
Funeral home documents		☐	
Letters Testamentary (if applicable)		☐	
Inventory of assets		☐	

Store originals securely and keep copies where you can find them.

NOTES AND FOLLOW-UP

Insurance Policies

List each policy and the person or company to contact.

Policy type	Insurer	Policy reference	Contact	Beneficiary	Notes

Examples include life, home, auto, health, renters, disability, and long-term care.

NOTES AND FOLLOW-UP

Bank & Financial Accounts

Record the institution, account type, and the names shown on the records.

Institution	Account type	Account last 4	Authorized users	Notes

Examples include checking, savings, credit cards, loans, and investment accounts.

NOTES AND FOLLOW-UP

Monthly Bills & Subscriptions

Track due dates and whether each service should continue, transfer, or end.

Company / service	Amount	Due date	Autopay?	Statement location	Action / notes

Examples include mortgage, electricity, water, phone, internet, and memberships.

NOTES AND FOLLOW-UP

Medical Information

Record relevant providers and the location of medical and insurance records. Keep this page private.

PHYSICIANS AND PROVIDERS

Provider type	Name	Phone	Address / location	Notes

MEDICATIONS

Medication	Dosage	Frequency	Prescriber	Purpose	Notes

ALLERGIES

Allergy	Reaction	Severity	Notes

HEALTH INSURANCE

Insurer	Member ID reference	Group number	Contact	Notes

Digital Assets & Online Accounts

List digital property and online services that may need follow-up.

Platform / asset	Username / email	Secure recovery record	Recovery contact	Instructions

Examples include email, social media, cloud storage, payment apps, and digital wallets.

NOTES AND FOLLOW-UP

Funeral & Final Wishes

Record known preferences or use this page to share your own wishes with family.

SERVICE PREFERENCES

Preference	Details
Burial or cremation	
Service type and location	
Clergy / officiant and phone	
Special requests	

MUSIC AND READINGS

Item	Details
Songs or hymns	
Scripture, readings, or poems	
Other requests	

OBITUARY AND MEMORIAL

Item	Details
Name to publish	
Date and place of birth	
Life highlights	
Honors, donations, or other details	

PEOPLE TO NOTIFY

Name	Relationship	Phone	Email	Notes

Pet Care Instructions

List daily routines and the people who can step in if needed.

PET DETAILS

Pet name	Type / breed	Color / markings	Birth date / age	Microchip ID	Notes

VETERINARIAN

Clinic / veterinarian	Phone	Address	After-hours contact	Notes

FEEDING AND DAILY CARE

Pet	Food / brand	Amount	Schedule	Treats	Instructions

MEDICATION AND HEALTH NEEDS

Pet	Medication	Dose	Frequency	Reason	Notes

EMERGENCY AND BACKUP CARE

Role	Name / relationship	Phone / alternate	Where pet should go
Emergency			
Backup			

Safe Deposit Boxes & Keys

Record where to find keys, storage units, and secure access instructions.

SAFE DEPOSIT BOXES

Bank / institution	Branch	Box number	Key location	Who has access	Notes

KEYS AND IMPORTANT LOCATIONS

Key / item	Location	What it opens	Notes

ALARM AND SECURITY SYSTEMS

System	Company	Account reference	Secure record location	Notes

STORAGE UNITS

Facility	Location	Unit number	Key / secure record	Notes

Keep access codes in a separate secure record.

Dependents & Beneficiaries

Record who needs ongoing support and where beneficiary designations can be verified.

DEPENDENTS

Full name	Birth date	Relationship	Lives with	Financial support?	Care instructions

BENEFICIARIES

Name / organization	Relationship / type	Contact	Primary / contingent	Account / asset	Notes

NOTES AND FOLLOW-UP

Trusts & Legal Arrangements

Record where documents are kept and who to contact for verification.

TRUST AND GUARDIANSHIP DETAILS

Item	Details
Trust on file?	
Trust name	
Trustee name(s) and contact	
Trust document location	
Named guardian, if applicable	
Alternate guardian	
Attorney / records contact	

ADDITIONAL NOTES