The Executor's First 7 Days

A calm, one-page list for the person handling things after a death. You do not have to do it all at once. Do one line at a time, and write down who you talked to.

DAY 1 TO 2

- [ ] Confirm the death has been officially pronounced and get the name of the person who pronounced it.
- [ ] Call the people on the family's call-first list. Ask one person to help you keep track of calls.
- [ ] Contact the funeral home or cremation provider you or the family chose. Ask what paperwork they need from you.
- [ ] Locate the will and any wishes written down (check the home file, safe, desk, or attorney). Do not open a sealed safe deposit box without checking local rules first.

DAY 2 TO 4

- [ ] Ask the funeral home for at least 10 certified copies of the death certificate. Most banks and agencies each want one.
- [ ] Secure the home: lock up, collect mail, remove valuables, care for pets, and arrange for medications to be handled safely.
- [ ] Tell the employer (ask about final pay, life insurance and benefits) and any care facility or agency involved.
- [ ] Do not cancel phones, email or cloud accounts yet. You may need them to find bills and assets.

DAY 4 TO 7

- [ ] Start a simple log: date, who you spoke with, what they said, what happens next.
- [ ] Call the Social Security Administration (1-800-772-1213) or ask the funeral home to report the death. Ask Social Security before keeping or spending any payment that arrives after the death.
- [ ] Contact an estate attorney or your local probate court to ask what the next step is. Rules vary by state, and a short call can save you months.
- [ ] Make a list of bills coming due and who pays them for now. Note any auto-payments that will keep running.

Want the whole map?
The Final Wishes & Executor Kit adds the 30 and 90 day lists, an account inventory, a notify list, funeral wishes and a log.
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