

Executor Starter Checklist

A practical first-step checklist for executors and liquidators who need to organize documents, accounts, advisors, and estate responsibilities after a death.

Immediate First Steps

- Locate the will and any estate-related legal documents
- Identify the executor or liquidator named in the will
- Gather identification documents and death certificates
- Create a list of banks, investment accounts, and insurance policies
- Identify property, mortgages, debts, and recurring bills
- Make a list of accountants, lawyers, and financial advisors involved
- Secure important physical and digital records
- Create a basic inventory of assets and liabilities
- Keep notes of conversations, deadlines, and responsibilities
- Avoid making major financial decisions before the full picture is organized

Cross-Border Situations

If the estate involves Florida, Quebec, Canada/U.S. assets, snowbird residency, or family members in different jurisdictions, additional coordination may be needed.

Need Help Organizing the Process?

Nola Advisory LLC helps executors, liquidators, and families organize estate-related financial information, coordinate professionals, and move forward with greater clarity.

Nola Advisory LLC

<https://nolallc.com>