Executor Checklist

A guide for the job you didn't apply for

Coastal *Law Group*

WELCOME

Hi there!

Being appointed as an executor is an important responsibility, and it can feel overwhelming if you don't know where to start.

This Executor Checklist has been prepared to provide a clear overview of the key steps involved, helping you navigate your responsibilities with confidence and clarity.

If you need advice or support at any stage, our team is here to guide you every step of the way.

Coastal Law Group

ABOUT COASTAL LAW GROUP

Yes, we're a law firm—but not the kind you might expect.

At Coastal Law Group, we believe legal guidance should bring clarity and confidence—not confusion.

Acting as an executor is an important responsibility, but you don't have to navigate it alone.

Administering an estate is about more than paperwork. It's about honouring a loved one's wishes, protecting family relationships, and ensuring their affairs are managed with care.

ABOUT THIS DOCUMENT

This document has been designed to help you navigate your responsibilities as an executor with confidence and clarity.

It provides a clear overview of the key steps involved in administering an estate.

Every estate is unique, which means there is no one-size-fits-all approach to administering an estate.

While this checklist cannot cover every task an executor may encounter, it outlines the key steps involved in administering most estates.

If you need assistance at any stage of the administration process, our team is here to help.

EXECUTOR CHECKLIST

Tick off each task as you complete it.
But remember, not every task will apply to every estate! There is also room for you to add additional tasks that may not be covered.

Task	Done	N/A
Locate the original Will of the deceased		
Note any special instructions contained in the Will in relation to the burial/cremation/funeral arrangements for the deceased		
Arrange funeral for the deceased		
Obtain the death certificate of the deceased		
If you are engaging a solicitor to assist in the administration of the estate, meet with your solicitor		
File claim for any life insurance payable to the estate		
Examine all policies of insurance on real estate and increase coverage where required		
Identify and inspect any real estate owned by the deceased and secure as required		
Obtain copies of any leases and/or mortgages that relate to any real estate owned by the deceased		
Attend to payment of funeral (if not pre-paid)		
Check with health insurer for any ‘funeral benefits’ payable		
If the deceased was receiving Centrelink benefits, contact Centrelink to cease payment of benefits		
If necessary, notify post office to forward mail of the deceased		

Task	Done	N/A
Arrange for any telephone and internet services to be cancelled		
Search for assets of the deceased, including superannuation		
Assemble supporting data and estimate a value of the assets of the estate		
If the deceased had a safe deposit box, examine the contents of the same and make a list of contents		
If required, have assets appraised by qualified appraisers to identify value		
If required, obtain asset values for capital gains tax purposes as at date of death		
Gather information about the deceased's financial affairs for the years immediately prior to their death		
Obtain details of any businesses/companies/trusts in which the deceased had an interest as at the date of their death		
Identify the creditors of the deceased and ascertain the value of the liabilities of the deceased		
Identify the status of any personal guarantees provided by the deceased		
Determine if a tax file number is required for the estate and, if required, obtain the tax file number (or engage an accountant to do so)		
Determine if a Grant of Probate is required and, if so, arrange for an application for a Grant of Probate to be filed with the Supreme Court of Queensland (or engage a solicitor to do so)		
Open a bank account for the estate (unless you have engaged a solicitor, in which case they may allow you to use their trust account)		

Task	Done	N/A
Notify banks of your appointment as executor of the estate		
Collect all income and any other monies due to be paid to the estate		
From the assets of the estate, discharge any debts of the deceased		
Sell assets of the estate where required		
Keep a detailed record of all income, expenses, and transactions relating to the estate		
If deceased owned any real estate in another state or territory, ascertain requirements for such real estate to be dealt with		
Defend against any lawsuit brought against the estate		
Study the deceased's income tax returns for the three year period prior to their death		
File a final tax return for the deceased		
Prepare for any audit by tax authorities of income tax returns filed by the deceased		
File income tax returns for the estate during the period of administering the estate		
Consider the income of beneficiaries in making distributions of property from the residuary estate		
Select date for distributions to result in overall tax economy for both the estate and the beneficiaries		

Task	Done	N/A
Provide beneficiaries with the capital gains tax basis of assets distributed 'in specie' (i.e. where a specific asset has been transferred to a beneficiary)		
If necessary, make partial distributions to beneficiaries during the course of administering the estate		
Prepare data for final accounting of the estate, to show all assets and disbursements		
Distribute the assets of the estate in accordance with the deceased's Will		
Receive receipts from the beneficiaries		

WHAT IS PROBATE AND DO I NEED IT?

01 **What is a Grant of Probate?**

A Grant of Probate is an order made by the Supreme Court of Queensland that confirms a Will is valid and officially recognises the executor's authority to administer the estate.

02 **When does an executor need a Grant of Probate?**

Not every estate requires a Grant of Probate. Whether it is needed depends on the type and value of the assets owned by the deceased, and the requirements of the organisations holding those assets. For example, a Grant of Probate is often required where the deceased owned real estate in their sole name or held significant funds with a bank or financial institution. In smaller or simpler estates, it may not be necessary.

If a Grant of Probate is required, the executor will generally need to obtain the Grant of Probate before they can collect, sell or transfer certain estate assets.

Every estate is different. If you're unsure whether a Grant of Probate is required, obtaining legal advice early can save time, avoid unnecessary delays, and help ensure the estate is administered correctly.

03 What happens when there is no Will, the Will is invalid, or there is no valid executor willing to act

If a person dies without a valid Will, or there is no executor who is able and willing to act, an eligible person may need to apply to the Supreme Court of Queensland for a grant of Letters of Administration.

04 What are Letters of Administration?

A grant of Letters of Administration is an order of the Supreme Court of Queensland that authorises an eligible person to administer the deceased's estate. The appointed administrator has many of the same responsibilities and powers as an executor, including collecting estate assets, paying debts, and distributing the estate to the appropriate beneficiaries.

05 When are Letters of Administration required?

Just like a Grant of Probate, not every estate requires Letters of Administration. Whether an application is needed depends on the type and value of the assets owned by the deceased, and the requirements of the organisations holding those assets. In some smaller estates, assets may be transferred without obtaining Letters of Administration.

If you're unsure whether Letters of Administration is required, obtaining legal advice can help.

USEFUL RESOURCES

Links to resources that may assist you in administering an estate

01

Australian Death Notification Service (ADNS)

The ADNS is a free online service that allows you to notify multiple government and non-government organisations that a person has died, using a single notification.

As an executor, this service can help simplify the process of closing or transferring accounts and services held by the deceased, including notifying participating organisations such as financial institutions, insurers, utility providers, and other service providers.

Before you can use this service, the deceased's death must be registered with the Registry of Births, Deaths, and Marriages. Registration typically occurs just prior to the deceased's death certificate being issued.

Once a notification is submitted on the ADNS, each organisation will contact you directly regarding their specific requirements and the next steps to finalise the deceased person's accounts.

https://deathnotification.gov.au/

02 **Searching for Superannuation Entitlements**

Find out how to search for lost or unclaimed superannuation accounts.

https://www.ato.gov.au/forms-and-instructions/superannuation-searching-for-lost-superannuation

03 **MoneySmart - Unclaimed Money Search**

Complete a search to find unclaimed money being held for the deceased.

https://moneysmart.gov.au/find-unclaimed-money

04 **Services Australia (including Centrelink)**

Information on how to deal with Services Australia in relation to a deceased individual.

https://www.servicesaustralia.gov.au/what-to-do-when-someone-dies?context=60101

HOW WE CAN HELP

01 **Obtaining a Grant of Probate or Letters of Administration.**
We can prepare and manage the entire application process, ensuring the required documents are completed accurately and filed with the Supreme Court of Queensland.

02 **Advising executors on their legal duties and obligations.**
We provide clear, practical advice to help executors understand their responsibilities, minimise risk, and confidently fulfil their legal obligations.

03 **Assisting with collecting and distributing estate assets.**
From identifying and collecting estate assets to paying liabilities and distributing assets to beneficiaries, we can guide you through each stage of the administration process.

04 **Complete Estate Administration**
If you'd prefer not to manage the estate yourself, we can handle as much or as little of the administration as you need.

HAVE QUESTIONS?

Get in touch with us, we'd love to help!

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