

Executor's Responsibilities in North Carolina

A portion of the following list is provided to you from the North Carolina Estate Settlement Guide. This is a checklist of what the Executor's responsibilities are within the first month of being appointed. This is not to be considered legal advice and or a complete checklist of what is required of an Executor. It is provided as a very basic overview. It is recommended that you consult with a licensed attorney in North Carolina with familiar with the Probate process and requirements.

1. Complete all documentation necessary to become the personal representative (Petition for Letters and Oath at a minimum);
2. Gather information on the decedent and the decedent's **probate** assets (this is required for the Petition);
3. Make an appointment with the **probate** clerk (not always necessary);
4. Meet with the **probate** clerk (again, not always necessary);
5. Inventory Safe Deposit boxes (You may need a Court Order to open this if you are trying to do it before the Letters are issued by the Clerk);
6. Gather and protect estate property;
7. Retain experts (CPA's, Attorneys, Financial Planners, for example);
8. Investigate potential wrongful death claims (you will have to disclose whether there is a potential wrongful death claim);
10. Obtain tax identification number (you will need this before you open an Estate Account);
11. Open estate bank account (using the tax identification number as the "social security number" so to speak of the Estate Account);
12. Pay the year's allowance (if the surviving spouse requires it);
13. Activate or terminate government benefits;
14. Obtain prior tax returns;
15. Obtain death certificates (the funeral home usually orders these for the family when they burial arrangements are made. I would order at least 10);
16. Publish notice to creditors (cannot do this until the Letters have been issued by the Clerk);
17. Identify legal obligations of the decedent (creditors, etc.);

18. Start going through decedent's personal effects to determine where assets may be held and or any liabilities he or she has outstanding;
19. Keep very detailed records on any checks deposited into the Estate Account as well as any checks written from the account;
20. Call an attorney if you get too overwhelmed with the process!