

Checklist of Important Papers for Executors



As an [executor](#) you will have a multitude of tasks to perform. Most know you need to have a copy of the Will, Power of Care and Power of Attorney, but there are other things to consider that we don't often think about until it is too late, like [passwords](#). Use this checklist to make sure you have all of the documents you may need.

Some information will be needed for terminating contracts or returning rental items. Others will be helpful for the realtor and of course yourself as an executor.

Important Papers for Executors Checklist

Item to Consider – do you have copies of these?	Yes	No
Home Insurance (Contact them to keep policy in effect)		
Deed for Property		
Deed for Seasonal Property		
Deed for Foreign Property		
Deed and Description for Parking Space(s) for Condo		
Deed and Description for locker for Condo		
Lease Agreement for Residence		
Time Share Contract		
Lease Agreement for vehicle(s)		
Mortgage Papers		
Reverse Mortgage Statement		
Insurance – home		
Insurance – car		
Insurance – life		
Trusts		
Survey for land(s)		
Plans (especially if major renovations have been done)		
Recent Building Inspection		
Taxes		
Heat Bill		
Hydro Bill		
Gas Bill		
Water Bill		
Cable Bill (Is there any equipment to be returned?)		
Phone Bill (is there any equipment to be returned?)		
“Senior Alert” System (Does this need to be returned?)		
Major Purchases or Repairs (i.e. roof, phone)		
Warranties		
Security system		
Pool Maintenance		
Lawn Care		
Recent Septic Inspection		
Appraisals for Art, Jewelry and etc.		
Correspondence from Lawyer or Law Firm		

* See how you rate. If you answered No to any of these, you may want to talk to your family, financial advisor or lawyer for suggestions and support.

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