



End of Life Admin

Estate and Legal Finalisation Checklist

Will and executor

- Confirm who the executor is
- Obtain legal advice if needed
- Locate original signed will
- Determine whether probate is required

Assets and liabilities

- List bank accounts
- List property
- List vehicles
- List valuables
- List superannuation
- List insurance payouts
- List debts and liabilities

Estate administration

- Apply for probate if required
- Close accounts
- Pay funeral expenses
- Pay debts from the estate
- Transfer or sell property as required
- Distribute assets according to the will
- Keep records of all transactions