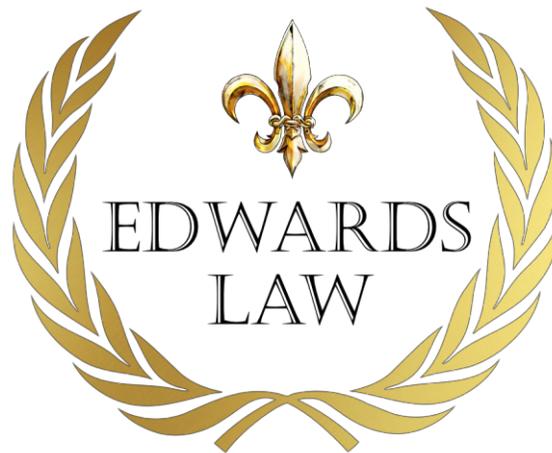




Executor & Administrator Toolkit





Executor's or Administrator's Initial Tasks Checklist

This checklist covers the first steps following a loved one's passing to help establish control of the estate.

1. Obtain several certified copies of the death certificate.
2. Secure property, mail, and financial documents.
3. Locate the original will and any trust agreements (if any).
4. Identify and notify heirs and beneficiaries.
5. Schedule a consultation with Edwards Law to begin probate filing.

Probate Timeline & Milestones

An overview of typical stages in an uncontested Georgia probate case. Timelines vary by county.

- Weeks 1-4: Gather documents and prepare the probate petition.
- Weeks 4-10: Court review and issuance of Letters Testamentary or Administration.
- Months 2-6: Administer the estate—accounts, debts, taxes, and distributions.
- Months 6-12: Complete final accounting and close the estate.

Document Collection Checklist

Gather the following documents to ensure a smooth probate process:

- Certified death certificate
- Original will and any codicils (if any)
- Property deeds and mortgage statements
- Bank, brokerage, and retirement account statements
- Life insurance and annuity information
- Vehicle titles and registration
- Outstanding bills, credit cards, and loan statements



Sample Estate Bank Letter

An estate bank letter is a formal notice from an executor or administrator authorizing a bank to close, transfer, or retitle the deceased's accounts in the estate's name.

[Executor's or Administrator's Letterhead]

[Date]

To: [Bank Name & Address]

Re: Estate of [Full Name of Decedent], Deceased

Account No(s): [If Known]

Dear [Bank Officer or Branch Manager],

Please be advised that [Decedent's Name] passed away on [Date of Death]. I am the duly appointed [Executor or Administrator] of the estate.

Enclosed are:

- Certified copy of the death certificate
- Certified Letters Testamentary or Letters of Administration from [County] Probate Court

Please confirm all accounts held in the name of the decedent and provide details on closing or transferring funds to the estate account titled "[Executor's or Administrator's Name], as [Executor or Administrator] of the Estate of [Decedent's Name]."

Thank you for your assistance.

Sincerely,

[Executor's or Administrator's Name]

[Executor or Administrator] of the Estate of [Decedent's Name]

[Address]

[Phone Number]



Beneficiary Notification Template

This courtesy notice template can be used to inform beneficiaries that the estate administration has begun.

[Executor's or Administrator's Letterhead]

[Date]

Dear [Beneficiary Name],

You are receiving this letter to inform you that [Executor's Name] has been appointed as [Executor or Administrator] of the Estate of [Decedent's Name]. The probate case has been opened in the [County] Probate Court of Georgia. The estate administration is underway, and updates will be provided as appropriate.

For any questions, please contact [Executor's or Administrator's Name] at [Executor's or Administrator's phone number] or [Executor's or Administrator's email address], or contact Edwards Law at (404) 341-9377 or info@edwardslawatl.com.

Sincerely,

[Executor's or Administrator's Name]
Executor of the Estate of [Decedent's Name]

