

# Planning considerations for executors

Every estate is different. Here's a starting list of things to consider for those who have been appointed as executor. You can use the blanks below to add your own ideas as you consult with a trust and estate attorney.

---

Check on the needs of loved ones left behind. Consider well-being and financial needs of dependents and care of pets.

---

Create a notification plan for family and friends.

---

Contact decedent's trust and estate attorney and other professionals.

---

If nominated as executor, contact an attorney to discuss qualifying with the court to be appointed executor.

---

Contact decedent's employer. If decedent was self-employed, determine how to gather pertinent records.

---

Identify paperwork you may need, such as:

- Estate planning documents
  - Copies of the death certificate
  - Federal and state income tax returns
  - Insurance policies — life, home, auto, and other property and casualty insurance
  - Statements from financial institutions
  - Bills — credit cards, utilities, hospital, medical care, loans, etc.
  - Ownership documents
  - Social Security Administration correspondence
  - Digital assets and accounts
- 

Identify other people and organizations with a need to know, including but not limited to:

- Financial institutions where the decedent had accounts or safe deposit boxes
  - Accountant, financial advisor, and tax advisor
  - Life insurance companies
  - Current and former employers and agencies from which the decedent received benefits
  - Mortgage lenders and county recorder or registrar
  - Utilities, services, and creditors
- 
- 
- 
- 

**Investment and Insurance Products: • NOT FDIC Insured • NO Bank Guarantee • MAY Lose Value**

Wells Fargo & Company and its Affiliates do not provide tax or legal advice. This communication cannot be relied upon to avoid tax penalties. Please consult your tax and legal advisors to determine how this information may apply to your own situation. Whether any planned tax result is realized by you depends on the specific facts of your own situation at the time your tax return is filed.

Wells Fargo Wealth & Investment Management (WIM) provides financial products and services through various bank and brokerage affiliates of Wells Fargo & Company. Bank products and services are available through Wells Fargo Bank, N.A. Brokerage products and services are offered through Wells Fargo Advisors, a trade name used by Wells Fargo Clearing Services, LLC, and Wells Fargo Advisors Financial Network, LLC, Members SIPC, separate registered broker-dealers and non-bank affiliates of Wells Fargo & Company.

This information is designed to provide general information regarding the estate settlement process, but it is not exhaustive. We encourage you to work closely with your tax advisor and estate planning attorney during this difficult time.

Trust services are available through Wells Fargo Bank, N.A. and Wells Fargo Delaware Trust Company, N.A.

Any estate plan should be reviewed by an attorney who specializes in estate planning and is licensed to practice law in your state.