



Legacy Wise Estate & Executor Support

Estate Records & Professional Handoff Checklist

Families and authorized representatives organizing records and professional coordination.

This is an administrative organizer, not legal advice or authority to act for an estate. Attorneys and relevant institutions determine authority, required steps and legal deadlines.

Four checks before you proceed

Confirm authority through the proper channel

Before acting on an account or asset, ask the attorney or relevant institution what authority and documents are required. Record who is authorized and what remains pending without copying sensitive identifiers into the shared worksheet. Keep family preferences separate from formal authority. An organizer helps coordinate the process; it does not grant permission to transact.

Build a factual records inventory

List known institutions, properties, correspondence and record locations using masked references. Record whether information is verified, reported by someone else or still unknown. Preserve originals according to the professional's instructions. Do not assume an inventory is complete, decide ownership or distribute an item based on a worksheet entry.

Assign professional follow-up

Use one register for requests from the attorney, tax preparer and other responsible professionals. Record the actual instruction, owner, date and document requested. Have the professional supply legal or filing deadlines. Use secure transfer for sensitive records. Keep unclear instructions open for clarification rather than interpreting them yourself.

Preserve the administrative trail

Record documents delivered, acknowledgments, changes and unresolved questions. Keep separate versions of inventories and note who reviewed each one. Do not mark the estate complete based on administrative task status alone. Have the appropriate professional confirm the relevant closure or next stage. Retain records according to their guidance.

Your next step

Open question	Who should answer	Next date

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