

# How-to Choose an Executor Checklist

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## Item 1: Assign My Executor

Executor: Primary

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Executor: Secondary

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Both my primary and secondary Executor knows where my Will is located

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I have informed my Executors of their responsibility and they are willing to assume the role.

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## Item 2: My Executor has the following capabilities

Reliable

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Responsible

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Good financial standing

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Some knowledge of the state law and legal requirements for Probate

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Over the age of 18

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### *Item 3: Assign Trustee (If Applicable)*

| Trustee Name

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| Instructions:

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### *Item 4: Attorney Information (If Applicable)*

| Attorney name and contact information:

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| Instructions:

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### *Item 5: Informing my Executor*

| Both my primary and secondary Executor are aware of the responsibilities

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| My Executor approved of their title

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| My Executor knows the location of the important documents to carry out my wishes