



ESTATE ADMINISTRATION · FIDUCIARY CHECKLIST

## Executor & Administrator First-Steps Checklist

Serving as executor or administrator is a fiduciary role with real duties and deadlines. Texas sets the order of who may serve, and most estates can be handled through independent administration once the court grants authority. Keep careful records from day one.<sup>1</sup>

### ◆ First steps

- Locate the original will and any trust
- Order multiple certified death certificates
- Secure the home, vehicles, and valuables
- Identify and protect estate assets
- Do not pay debts or distribute property before getting legal guidance
- Keep a running log of every transaction and decision

### ◆ Working with the court

- File the application for probate in the right county
- Attend the hearing and qualify as personal representative
- Publish and send notice to creditors
- Prepare the inventory, appraisal, and list of claims
- Track deadlines for filings and accountings

### ◆ Key contacts

Estate attorney

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Accountant / tax preparer

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Financial institutions

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### ◆ Questions for the attorney

Authority, deadlines, creditor claims, or distribution

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### REFERENCES & SOURCES

1. Tex. Est. Code § 304.001 (order of persons qualified to serve as executor or administrator). [statutes.capitol.texas.gov](https://statutes.capitol.texas.gov)
2. Tex. Est. Code §§ 401.001–401.003 (independent administration). [statutes.capitol.texas.gov](https://statutes.capitol.texas.gov)
3. Tex. Est. Code § 256.003 (a will generally must be admitted to probate within four years of death). [statutes.capitol.texas.gov](https://statutes.capitol.texas.gov)
4. Bexar County Probate Courts. [www.bexar.org](http://www.bexar.org)
5. Texas Law Help, "Wills, Estate Planning and Probate." [texaslawhelp.org](https://texaslawhelp.org)

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