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The opening pages of

## Executor's Kit

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# The Executor's Kit

## Settling an estate without the family going to war

*A step-by-step guide from someone who has sat in the chair you're sitting in now.*

By Bill Morton

An organizational tool. Not legal advice, not tax advice.
Laws vary by state — when in doubt, ask an attorney in yours.

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# A note before you start

My name is Bill Morton. I'm 70 years old, and a few years back, my mother passed away and I became the executor of her estate.

Our family was spread all over the place. And my mom — bless her — was a **collector.** So this wasn't three rooms of furniture. It was a house full of items, and every one of them had somebody in the family with an eye on it.

Here's what everyone agreed on: they wanted the items dealt with and the house sold **as fast as possible.** Nobody wanted a two-year ordeal. Nobody wanted to fight. But with that many items and that many heirs in that many states, fighting is exactly what usually happens.

So I did what I'd done my whole working life when a problem was too big to argue about: I built a system. I made a website. I photographed **every single item,** gave each one a number, and put the whole list up where the whole family could see it. Then everybody **bid** on what they wanted — quietly, in writing, with a deadline. When the bidding closed, each person's winning bids were **deducted from their share** of the estate.

It worked exceptionally well. There was almost no arguing — because there was nothing to argue about. The rules were the same for everybody, the numbers were visible to everybody, and **if someone really wanted an item, they could get it.** That's the whole trick. Most estate fights aren't about money. They're about feeling like the process wasn't fair.

This kit is that system, written down so you don't have to invent it while you're grieving. I've been in the chair you're sitting in. It is a hard job, and you can do it well. Let's go step by step.

### Two promises about this kit

First: everything in here is in plain English, in the order you'll actually need it. Second: this kit organizes the job — it does not replace a lawyer or a CPA. Where the law or taxes get sharp, I'll tell you plainly to call one. That's not a dodge; it's the most honest advice in this book.



An organizational tool · not legal or tax advice. · bill@aitoolsfortoday.com

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# Read this first: the 48-hour checklist

The first two days set the tone for everything after. You don't have to do the whole job this week — you just have to **secure things, find the paperwork, and tell the right people.** Work this list top to bottom. Check each box as you go.

## Secure the person and the property

- ☐ **Locks and keys.** Change or re-key the locks if keys are floating around with neighbors, caregivers, or handymen. Collect every spare.
- ☐ **Walk the house and photograph every room as-is,** before anything is moved. Open every closet. This is your baseline — you'll thank yourself later.
- ☐ **Secure valuables, firearms, medications, and important papers** in one locked place. Firearms: check your state's transfer and storage rules before moving them.
- ☐ **Pets and dependents.** Make sure every living creature and every person who depended on them is cared for today, not next week.
- ☐ **Mail.** Put in a forwarding order or a hold at the post office so financial statements don't pile up in an empty house.

## Find the paperwork

- ☐ **Locate the will** (and any trust documents). Usual places: home safe, filing cabinet, safe-deposit box, the attorney's office. **Read it before you promise anyone anything.**
- ☐ **Get certified copies of the death certificate** — order 10 to 15. Banks, insurers, and agencies each want their own, and reordering later is slow.
- ☐ **Gather the money map:** bank and brokerage statements, deeds, car titles, insurance policies, pension and Social Security info, debts and bills. Don't pay anything yet — just gather.

## Tell the right people

- ☐ **The estate attorney** (if there is one) — a 30-minute call now saves 30 hours later. If there's no attorney yet, Section 9 tells you when you need one.
- ☐ **Social Security** (1-800-772-1213), the **employer or pension administrator,** and any **life insurance** companies.



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