



A Short Guide for Executors

Practical first steps when you are named as an executor. This is general guidance, not legal advice.

What an executor does

- Gathers the will and important documents
- Registers the death and obtains certificates
- Notifies banks, pensions, insurers and government
- Values the estate
- Applies for probate if it is needed
- Settles debts and distributes the estate

First documents to find

- The will
- Death certificate
- Bank and savings details
- Property deeds or mortgage papers
- Pension and insurance policies
- Recent bills and statements

Who to notify

- Banks and building societies
- Pension providers
- Insurance companies
- Utilities and the council
- HMRC and DWP - the government's 'Tell Us Once' service can notify many at once

Where to get help

- nidirect.gov.uk for official Northern Ireland guidance
- A solicitor for probate and more complex estates
- David Crymble & Sons for the funeral and any support you need