

Pennsylvania Executor's Checklist

A step-by-step guide to estate administration in Pennsylvania

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| <div style="background-color: #1a3d4d; color: white; padding: 5px; margin-bottom: 10px;">PHASE 1: IMMEDIATE STEPS (DAYS 1–14)</div> <ul style="list-style-type: none"> <input type="checkbox"/> Locate the original will and any codicils <input type="checkbox"/> Obtain 10–15 certified death certificates <input type="checkbox"/> Contact the Register of Wills in decedent's county <input type="checkbox"/> File will and petition for Letters Testamentary <input type="checkbox"/> Pay the filing fee (~\$250 depending on county) <input type="checkbox"/> Secure all real and personal property <input type="checkbox"/> Notify banks, insurers, and financial institutions <div style="background-color: #1a3d4d; color: white; padding: 5px; margin-bottom: 10px;">PHASE 2: NOTICE & INVENTORY (DAYS 14–60)</div> <ul style="list-style-type: none"> <input type="checkbox"/> Publish estate notice in newspaper and legal journal <input type="checkbox"/> Send written notice to all beneficiaries and creditors <input type="checkbox"/> Obtain EIN from IRS (Form SS-4) <input type="checkbox"/> Open estate bank account <input type="checkbox"/> Compile inventory of assets with date-of-death values <input type="checkbox"/> File Inventory with Register of Wills (~\$1,000 fee) <input type="checkbox"/> Identify all debts — mortgages, credit cards, medical | <div style="background-color: #1a3d4d; color: white; padding: 5px; margin-bottom: 10px;">PHASE 3: ADMINISTRATION (MONTHS 2–9)</div> <ul style="list-style-type: none"> <input type="checkbox"/> Pay valid creditor claims as received <input type="checkbox"/> Manage estate property — insurance, taxes, utilities <input type="checkbox"/> File PA Inheritance Tax Return (REV-1500)
<small>Due within 9 months of death</small> <input type="checkbox"/> 5% discount if paid within 3 months of death <input type="checkbox"/> File decedent's final federal and state income tax returns <input type="checkbox"/> File estate income tax returns if estate earns income
<small>Form 1041</small> <input type="checkbox"/> Obtain tax clearance from PA Department of Revenue <div style="background-color: #1a3d4d; color: white; padding: 5px; margin-bottom: 10px;">PHASE 4: DISTRIBUTION & CLOSING (MONTHS 9–12+)</div> <ul style="list-style-type: none"> <input type="checkbox"/> Prepare formal or informal accounting of all transactions <input type="checkbox"/> Obtain receipts and releases from all beneficiaries <input type="checkbox"/> Distribute assets per will or intestacy laws <input type="checkbox"/> Close estate bank accounts <input type="checkbox"/> File final account with Register of Wills if required <input type="checkbox"/> Retain estate records for at least 7 years |
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Beneficiary	Rate	Examples
Surviving spouse	0%	Exempt regardless of amount
Children / lineal descendants	4.5%	Children, grandchildren, parents
Siblings	12%	Brothers and sisters
All others	15%	Nieces, nephews, friends