



DENVER

WEALTH MANAGEMENT

Your Checklist for Executor/Trustee Roles

(303) 261-8015 | www.denverwealthmanagement.com

Paperwork ✓

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In order to address your financial future, it is important that you have your trustee roles in order. Follow these steps to ensure a solid start.

- File the 706 form.
- Four months after the 706, request the closing letter.
- Determine if probate is necessary.

Finances ✓

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This paperwork can get confusing. In order to get this completed, feel free to reach out to our office for assistance. We would be happy to help you finish your checklist.

- Locate and manage assets.
- Establish an estate bank account.
- Pay expenses and taxes.
- Pay debts and pay creditors.
- Distribute property.
- Close the estate.