FOR EXECUTORS · ENGLAND & WALES

WillSafe

UK

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The Executor's First 90 Days

A plain-English roadmap for the person carrying out a Will

What to do, in what order, with sample letters, forms, and a 90-day timeline. England & Wales.

For England & Wales

A self-help template kit, not legal advice

The complete DIY estate plan, done properly.

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If you've just been named executor, start here

Being an executor is a serious responsibility. It is not, however, complicated. Most of the work is paperwork, done in roughly the same order regardless of the estate.

This guide breaks the job into three blocks of time, the first week, the first month, and the first 90 days, so you always know what's next. There are also sample letters, a who-to-call template, and an inheritance-tax cheat sheet.

> **YOU CAN HIRE HELP, PAID FOR BY THE ESTATE**
> If at any point the paperwork feels too much, you can instruct a solicitor or a probate specialist (e.g. Co-op Legal Services, Farewill). Their fee comes out of the estate, not your pocket. Many executors hand off the property sale or the IHT400 specifically.

What's inside

Part 1, Your duties as executor

An executor has six main duties under English law.

1. Locate the Will and confirm you are named as executor.
2. Identify and value all the assets and debts of the estate.
3. Pay any inheritance tax owed (with help from HMRC's online tools).
4. Apply for a Grant of Probate (if needed).
5. Collect the assets, pay the debts.
6. Distribute what's left to the beneficiaries as the Will directs, and keep records.

What you should NOT do

- Don't distribute money before all debts are settled. You can be personally liable.
- Don't take any of the estate for yourself unless the Will gives you a gift. Executors are usually unpaid (lay executors), unless the Will specifies a fee.
- Don't sell the deceased's home before probate is granted, except in narrow circumstances.
- Don't decide whether to challenge the Will or not without legal advice.

YOU CAN STEP ASIDE IF YOU DON'T WANT TO DO IT

Being named executor doesn't force you to take it on. You can "renounce probate" (formally decline the role) by completing form PA15 before doing any executor work. Any substitute named in the Will steps up. Discuss with co-executors first.