

INFO FOR EXECUTOR OF WILL  
By Virginia Erhardt

STEP 1. Immediate phone calls: 1) call my doctor's office. Tell staff or answering service that I died. 2) unless the sheriff's office already knows I died, call: 360.378.4151. They must notify the coroner before the body is picked up by the funeral home or crematorium. If I die at home, you'll be notified. 3) please call the crematorium I've chosen and request pick up of my body at a time it's convenient for you to be at my house. You won't have to go to the crematory at any point. Contact info: \_\_\_\_\_ . If I die elsewhere, the EMT's and Sheriff's office will be involved and they will get the info from a card in my wallet and notify you of my death. They'll make the arrangements for transport of my body to the funeral home/crematorium.

The funeral home has the legally required Authorization for Cremation and Disposition form, which I signed and sent them. All arrangements have been made other than payment, which should be \$1,200-\$1,500 (their April, 2016 estimate was \$1,185).

They will send a bill. They will want to be paid within 2 weeks of picking up my body, so it's important to get the ball rolling to get the Letters Testamentary/Personal Representative Form from San Juan County Court to take care of things at the bank so you can sign checks for my estate. The funeral home has been instructed to mail the cremains to my Executor. Make sure they have your address for that, if you're not the first person on my list of potential executors. They have my primary executor's contact information, but there wasn't a place on their form for alternate executors.

There are instructions in my will as to the distribution of my cremains. My next of kin are aware of the kind of service I want. I have no desire for publication of an obituary.

The funeral home will send you 5 certified copies of the death certificate, which should be more than enough for any entities that will require one as my estate is being probated. They do that quickly.

STEP 2: **ASAP**, contact the probate attorney. You'll need the original of my will, which is located \_\_\_\_\_, with other files e.g. the one regarding cremation.

**The Probate Attorney** I've selected and his contact info is \_\_\_\_\_  
With him, everything can be handled without meeting or going to court yourself. I've informed him that I want him to handle probate of will. Early in the process, until he gets the **Letters Testamentary/Personal Representative Form** to you, time is of the essence, so faxing back and forth is very helpful. You can send and receive faxed at Office Cupboard.

STEP 3. Banking/Bill Paying: According to Candace Bodenhamer, the current manager of the Orcas branch of Islanders Bank (direct line 1235), the bank may magically find out that I died and freeze my checking account, freezing autopayments I've set up. If the account is frozen, the bank won't honor any checks written on or after the date of my death.

So, immediately beginning the process with the attorney is vital. He'll go to court as soon as you notify him of my death and file to open probate of my estate and to get you appointed my Personal Representative. He'll send you the Letters Testamentary for San Juan County Court that you'll need, particularly for deal with financial matters. Once you have the **Death Certificate** and the **Letters Testamentary/Personal Representative Form** for the attorney, you'll sign before a notary as Petitioner. You can do this at Islanders Bank. You can do it wherever you prefer, but you will have to go to Islanders anyway with the paperwork mentioned in bold print in this paragraph. The paperwork will enable you to close my current checking account and open one named: "**(Executor's name), as Personal Representative of the Estate of Virginia Erhardt, Deceased**". They'll transfer the money from my old account into this new account and you will have the sole power to sign checks on that account.

While you'll be closing various accounts, some entities will continue to require payment, e.g. water, sewer, mortgage, land lease and OPALCO until it's time to either shut them off or transfer them into a renter or buyer's name, since the house is a legacy gift to OPAL.

It makes sense to me **not** to set up auto payments that would be in force for such a brief period of time. You might as well just check my PO Box \_\_\_\_\_ often for bills and pay by due date, although all that's up to you.

Below, you will find numbers to call to tell people I die and to stop sending bills, or expecting payments, e.g. my health insurance, etc. Some, e.g. credit cards, may give you final payment due amount as of the day you inform them and you'll send them a check, once you've got the Estate checking account open. Or, they'll send a final bill in the mail. Paying most of my bills will be required of you for a very brief time.

You'll also find below a list of bills some of which are identical each time, set up to be paid automatically by my bank. Others I pay when the bill comes in the mail. This list is to give you an idea of how extensive your temporary financial duties will be.

My checkbook, so can see an up to date account balance, and stamps for sending out checks are kept in \_\_\_\_\_, located \_\_\_\_\_. You can have checks for the estate account sent to my PO Box \_\_\_\_\_ especially if you have just a mailbox, as they'll be more secure.

My IRA Annuity distribution is automatically deposited annually in January. No further distributions will be deposited after my death. Social Security auto deposits are made monthly on the fourth Wednesday, but the funeral home is required to inform Social Security of my death and those payments will stop. That's it for income. I've already arranged with my publisher for book royalties to be sent to my granddaughter.

Questions about my IRA can be addressed to my financial advisor. Name and contact info: \_\_\_\_\_. With the special powers of your paperwork, you

can have funds sent to you from my IRA Money Market account for expenses, if you need more than what's in checking. My financial advisor has the info about the percentage to go to each of my heirs. He'll need an official copy of the death certificate to release any remaining funds in the IRA.

Please give my heirs (my son, and each of my grandchildren, whose contact info is in the addendum) contact info for my financial advisor. My heirs have to call or email him to provide him with their current contact information. He'll set up accounts for each heir and disperse funds to them from those new accounts.

Feel free to insist that my son and grandchildren be organize about coming to get stuff they want from my house so it's convenient for you. Also, let them know that anything not removed within 30 days of their notification will be sold at an estate sale that you'll hire someone to run.

When my family has taken all of my possessions they want (see my will for specifics), and you have taken anything you want, an estate sale has been held, run by your choice of person(s), with costs paid by the estate and profits kept by you, the rest of my stuff will have to be disposed of. You might check with Ian and Erica Harlow (6950) to see if they still do removal and disposition, or anyone you prefer. Then please hire someone to clean the house. For my previous move-out cleanings, I've hired \_\_\_\_\_.

Judging by what attorney and court fees were in 2013, I'd anticipate the total when I die to be around \$2,000.

### **Calls to Make to Close Accounts and Stop Bills Coming In**

List of credit card, account number, expiration dates, security codes and contact info:

My PO Box is # \_\_\_\_\_. The key to the PO Box is the small key on the key ring hanging \_\_\_\_\_ . Payment for the PO Box is due 5/31 and 11/30 each year. Bill comes in the mail. Keep renting it as long as it is needed. When credit cards have been closed and final bills paid, you don't need it. Go in or call and tell the postmistress I died and surrender the keys. Submit a change of address from the PO Box to my physical address. Once the PO Box is unavailable, please check the mailbox regularly until everything's been taken care of, the house has been sold, and you've received a notice from my attorney that Probate is closed.

Account # and contact info for Health Insurance: (Please call and terminate coverage)

Account # and contact info for cable TV provider:

Account # and contact info for wireless internet provider:

Account # and contact info for landline and mobile phone:

Account # and contact for car insurance and dates billed:

The car title is located \_\_\_\_\_.

There's a copy of the registration in \_\_\_\_\_ and another in \_\_\_\_\_.

Account # and contact info for any TV streaming service, e.g. Netflix:

Account # and username for internet server:

Account # and contact info for mortgage or landlord:

Account # and contact info for Eastsound sewer:

Account # and contact info for OPALCO:

Account # and contact info for Eastsound Water:

There are addenda with contact information for potential executors, heirs, and friends who will assist you if you ask. They are located \_\_\_\_\_.