Deceased estate: first steps checklist

A printable planning checklist. Do not sell, give away or discard estate property without appropriate authority.

Authority and safety

- Locate the Will and identify the executor or administrator.
- Clarify who may access, handle and make decisions about belongings.
- Check property security, insurance and any urgent maintenance.
- Record important documents, keys and valuables; protect originals.
- Seek professional advice where probate, disputes or uncertainty arise.

Plan the task

- Ask about deadlines, such as tenancy or property settlement.
- Create a room-by-room inventory and photographs where appropriate.
- Identify sentimental, valuable or disputed items for later decisions.
- Arrange people, equipment and safe access before lifting heavy items.

After authorised decisions

- Record approvals and decisions about each group of items.
- Confirm donation acceptance and recycling conditions before delivery.
- Obtain quotes for specialist clearing or moving if needed.
- Retain receipts, valuations and records for estate administration.