



Evaluating Potential Executors

If you are planning to name an individual rather than a professional as executor of your estate, you may find this checklist helpful in making your decision.

After answering the questions for each of the people you may be considering, note the number of times you chose “no” as an answer.

1. Is the person trustworthy? Think about what being trustworthy means to you based on your past experiences with the person.
 Yes No
2. Is the person efficient? In this case, efficient means being able to handle a lot of details and meet deadlines.
 Yes No
3. Does the person communicate well? Will he or she be able to talk effectively with court officers, bank and investment company representatives, and family members?
 Yes No
4. Does the person have a relationship with your family that will help ensure he or she will be committed to act in the best interest of your beneficiaries?
 Yes No
5. Could he or she stand up to people who object to the wishes you have expressed in your will?
 Yes No
6. As far as you know, is the potential executor in good health and likely to be able to serve when the time comes?
 Yes No
7. Does the person meet the legal requirements of your state?
 Yes No
8. Can you say without hesitation that the person you are considering is the best choice?
 Yes No

You can find a list of state probate courts at
<https://estate.findlaw.com/probate/state-probate-courts.html>