

ESTATE COMPASS

California Probate

Quick-Start

Your first 7 days as executor — a free guide from Estate Compass.

Do these first — Week 1

You've just been named executor. First: breathe. You don't have to do everything today. Here are the few things that actually matter in week one.

- Order 10+ certified death certificates — every bank and agency wants an original.
- Locate the original will and any trust documents.
- Secure the home, mail, vehicles, and valuables.
- Notify Social Security and any pension providers.
- Do NOT distribute any assets yet — distribution comes near the end.

What's coming next

After week one you'll open probate (DE-111 → DE-121 → DE-140 → DE-150 Letters). The date your **Letters** are issued anchors most California deadlines:

Obligation	Deadline	Source
Inventory & Appraisal	4 months after Letters	Prob. Code §8800
Creditor claims	later of 4 mo / 60 days	Prob. Code §9100
Notice to FTB & Medi-Cal	90 days after Letters	Prob. Code §9202
Federal estate tax (706, if any)	9 months after death	IRS
One-year claim bar	1 year after death	CCP §366.2

Want every deadline calculated for you — plus a full checklist, inventory, handbook & letter templates? The complete California Estate & Probate Organizer does it from just two dates. → [Get it at your Estate Compass / Gumroad link.](#)

This free guide is an organizational resource, not legal advice. Always verify with a licensed California attorney and the probate court.