

# The First Steps Playbook

*Part of The Probate Clarity Framework™ by Christian Buitron*

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You've just been given a profound responsibility during a difficult time. The feeling can be overwhelming. This isn't just a checklist; it's your strategic guide for the first 48 hours—designed to bring order to the chaos and set a clear path forward.

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## Your First 5 Moves

- ☐ **1. Secure the Blueprint: Locate the Original Will** This document is the source of truth for the entire process. It's the legal roadmap that details your authority and the decedent's final wishes. Finding the original is your immediate priority.
  - ☐ **2. Obtain the Keys: Order Certified Death Certificates** These are the official keys that unlock your ability to act. Order 5-10 certified copies. You will need them to access accounts, claim benefits, and file with the court.
  - ☐ **3. Protect the Primary Asset: Secure the Real Estate** An empty home is a vulnerable asset. Your first duty is to protect it. Immediately change the locks, secure all entry points, and ensure the property is safe from theft, vandalism, or unauthorized access.
  - ☐ **4. Lock Down the Finances: Notify Key Institutions** Contact all banks, brokerages, and government agencies (like Social Security) to formally notify them of the death. This freezes the accounts, preventing fraud and protecting the estate's financial assets.
  - ☐ **5. Assemble Your A-Team: Consult with a Probate Attorney** You are the CEO of this project, but you don't have to be the expert on everything. Your first and most important call is to a qualified probate attorney. They are your strategic partner for navigating the legal system and protecting you from liability.
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## The Fiduciary's Golden Rule: Document Everything

Your greatest asset as an executor is not just what you do, but the *record* of what you've done. From day one, start a "Probate Binder" (digital or physical). Keep meticulous, chronological records of every conversation, decision, receipt, and expense. This isn't just about organization; it's your protection and the foundation of your final accounting to the court.

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## You've Taken the First Step. Let's Plan the Journey.

These first steps are about control and protection. The next phase is about strategy and maximizing the legacy your loved one left behind. You don't have to navigate it alone. Let's build your clear path forward.

**Schedule Your Free Strategy Session**

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