

DUTIES OF AN EXECUTOR

LOCATE WILL

Make funeral arrangements

Preliminary conference with family, financial planner, accountant, lawyer and business associates

Advise beneficiaries and ascertain immediate needs of family

Protect Assets

Insure all property

Protect business interests

Collect valuables & income

Keep surplus funds invested

Determine assets and debts and prepare statement thereof

Cash

Business interests

Personal effects

Securities

Real estate

Property out of state

Debts due

Debts owing

Obtain grant of probate and attend to legal formalities with solicitor

Realise assets to pay liabilities including income tax to date

Distribution of Estate

Prepare accounting and tax information for beneficiaries

Pay legacies and hand over specific bequests

Establishing of Trusts

Transfer cash or assets to beneficiaries

Obtain Receipts

Continuing administration and asset management

Prepare final statements for beneficiaries

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