

# Executor Assist



I've ensured that everything will be  
**taken care of**, so no one will  
have the burden **in the future**

**The Office of Fair Trading states** that “people preparing Wills have the option to shop around for professional executor services, or to appoint a lay executor, for example a friend or family member, who can then choose to be assisted by a professional if required”.

“There is no requirement in law to appoint a professional executor and the costs for a professional executor to administer an estate can be high and vary considerably”.



**Assist  
Law**

**Protecting your world**

## I want to know what to do when someone dies

### Should I manage everything on my own?

Often families underestimate how time consuming and onerous dealing with a death can be. This may include registering the death, arranging the funeral and dealing with personal effects. Dealing with the estate involves being legally and financially liable, including attending Court and preparing and signing tax returns, all of which can be overwhelming while grieving and dealing with other family pressures.

### Should I go to a bank or solicitor?

A bank or solicitor will only take responsibility for your legal and financial obligations. Most charge an hourly rate, however the true cost of this often impersonal service is not known until the end of the process.

### How much might it cost?

The Office of Fair Trading (February 2011) found that for an average estate, professional fees can be between £3000 and £9000 which would come directly out of the assets, leaving less for your loved ones.



## When I am named executor in someone's Will, my Executor Assist Membership will make it straightforward

### Executor Support Services

Your **Executor Assist Membership** gives you and your personal representatives access to comprehensive personal support when it is needed most. This enables you as a named executor in a Will (or as an administrator in the absence of a Will), to access all the help you need to administer the estate in line with the law including:

- Securing property
- Dealing with dependent relatives and/or pets
- Establishing whether there is a valid Will
- Requirements for statutory notices
- Valuing assets and liabilities
- Deciding what the legal requirements are for the estate
- Collecting the assets
- Calculating debts and settlement
- Paying the expenses
- Identifying the beneficiaries including any charitable organisations
- Distributing specific gifts
- Initial distribution of the estate
- Capital gains tax, income tax, inheritance tax
- Estate accounts
- Final distribution of the estate
- Tax certificates
- Investment advice for the beneficiaries and/or Trustees
- State benefits & Final administration tasks

You will automatically be assigned a Personal Legal Case Manager, who will support you when someone dies, who understands your case and will be on hand whenever required to advise you on your legal, financial and tax obligations, which means that you have professional support when you need it most.

## My executors know the support will be there when they need it most

As well as supporting you as an executor, your membership also entitles your own executors to the help they need when administering your estate. They will receive the same level of help and support as you would have, so their role will be as stress-free as possible. This means that they will not have to worry about additional costs at an already difficult time. Having put this valuable service in place, it can either be used by you in your lifetime or your executors in the event of your death. In either event the same outstanding level of support will be provided.

In addition to the above benefits, members are entitled to a discount on our standard fees should they want to hand everything over and have it done for them.