

Being an Estate Trustee (Executor) – First Steps

Some people plan for when they will die. Everyone knows who the estate trustee is, the estate trustee knows where the original will is, the funeral is pre-planned and paid for, and the estate trustee knows about all the assets.

And then there's the rest of us...

The estate trustee needs to confirm that he or she is the estate trustee. The estate trustee needs to find the will.

If all that can be found is an unsigned or draft will, it is not safe to assume there is an original, signed one. If a lawyer prepared the draft will, check with the lawyer.

If the will was signed, the lawyer should be able to say who has the original – the lawyer or the testator.

The estate trustee is responsible for the funeral. This should involve the loved ones of the deceased. People sometimes put instructions in their will about the funeral, burial or cremation. This is another reason to find and check the will.

If possible, the estate trustee should secure the property in the estate, so that nothing is lost, stolen or damaged.

These first steps can usually be taken without the ongoing assistance of a lawyer. After the funeral, in many cases the estate trustee will need to talk to a lawyer about next steps.

This information is provided by Goddard Gamage LLP subject to the Disclaimer found at <http://www.ggslawyers.com/disclaimer>.