



**Simpler Law.**



**Will & Estate Planning.**  
**Role of an Executor**



## Role of an Executor.

### What is an executor?

An executor is the person appointed in a Will to administer the estate of a testator after they have died. It is an important role that carries the responsibility to ensure that the testator's final wishes in relation to their estate are carried out and a personal liability to ensure all legal obligations are discharged correctly.

### Initial tasks.

After the Will has been drafted the executor doesn't need to take any immediate action however, if you are unhappy with your appointment, you should speak to the testator. Your role begins after the testator's death however you still have the option to 'renounce' your appointment at that time if you are unwilling or unable to act.

Being an executor involves a number of tasks and responsibilities, some of which are outlined opposite. You can obtain help and guidance with any or all of these tasks from various sources. Simpler Law provides a free 'Bereavement Service' and can offer expert advice to executors about what to do next and how to do it. We can also take on some of these tasks for you, particularly those relating to the Court process or those which you are uncomfortable in having personal liability for.

Information can also be obtained from the Probate Registry, Citizen's Advice Bureau and from the [www.gov.uk](http://www.gov.uk) website. In any case it may be useful to obtain the following information from the Testator at this stage:

- Their wishes regarding funeral arrangements and donation of organs for medical purposes.
- The location of the Will and any other important documents – if the Will is stored with Simpler Law you will receive information containing details on where the document is kept and how to retrieve it.
- The names, addresses and telephone numbers of any other appointed executors.
- Any other personal wishes that are not detailed in the Will should be written down for you by the testator though they can only be followed if they do not conflict with a provision in the Will.

### Executor Support Service

**Simpler Law** are on hand to provide you with assistance at any time. Should you have any queries, or require our assistance, please contact us on **0333 600 1000**.

## Main Steps in the Administration of an Estate.

- 1 Locate the Will, register the death and obtain copies of the death certificate.
- 2 Undertake funeral arrangements.
- 3 Secure and insure the deceased's property (where applicable)
- 4 Produce a schedule of assets and liabilities. Obtain valuations and register the death with those holding assets.
- 5 Establish the identity of beneficiaries under the terms of the Will.
- 6 Prepare the appropriate Inheritance Tax (IHT) form and submit to HMRC. Payment for any IHT due will need to be arranged.
- 7 Submit all necessary documentation to the Probate Registry to obtain the grant.
- 8 Issue statutory notices in the London Gazette and local newspaper.
- 9 Collect together and realise the deceased's assets.
- 10 Pay any outstanding debts according to the terms of the Will or statutory order.
- 11 Pay any cash gifts and transfer any specific assets to the appropriate beneficiaries.
- 12 Establish what makes up the residuary estate and discharge any final tax liabilities.
- 13 Prepare Estate Accounts to be approved by the residuary beneficiaries and executors.
- 14 Distribute the residue of the estate according to the terms of the Will.

This is far from an exhaustive list and is intended as a basic guide only. Clearly estates vary in their make-up and complexity as do the Wills that distribute those estates. We therefore recommend that you take advantage of our free expert advice before acting.

For more information visit our website at [WWW.SIMPLERLAW.CO.UK](http://WWW.SIMPLERLAW.CO.UK) or text **TALK to 66777** or call us on **0333 600 1000**.

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