Guide for Executors

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1. Initial Steps

1. Locate and secure the original will
2. Arrange the funeral, considering any directions in the will
3. Protect the deceased's assets (e.g., ensure insurance coverage remains in place)

2. Gather Information

1. Identify and value all assets of the estate
2. Ascertain all liabilities and debts of the estate
3. Identify all beneficiaries named in the will

3. Prepare for Probate

1. Complete the Personal Application Form for probate
2. Collect necessary documents:

4. Apply for Grant of Probate

1. Submit the application to the Probate Office or relevant District Probate Registry
2. Attend the appointment in person, bringing:
3. Make an oath or affirmation before the Probate official

5. Administer the Estate

1. Once granted probate, contact all financial institutions to gather in the estate
2. Pay all debts and liabilities of the estate
3. Prepare an Inland Revenue Affidavit detailing all assets and liabilities
4. Obtain any relevant tax clearances

6. Distribute the Estate

1. Prepare final Estate Accounts
2. Distribute the remaining assets to beneficiaries according to the will
3. Provide a full accounting of the estate to beneficiaries

Remember, as an executor, you have a legal obligation to administer the estate efficiently and in the best interests of the beneficiaries.If you're unsure about any steps, it's advisable to seek professional legal advice.

We’re here to help! If you would like to talk to someone at Fields of Life please contact us: Phone: +44 (0)28 9263 6200 Email: info@fieldsoflife.org