

## Acting as an Executor - Factsheet

### What do you need to do if you are acting as an Executor?

- Register the death if there is no family member to do so
- Find out, if and when, the person last made a will, and obtain a copy
- Check the will for funeral wishes and if necessary, assist in organising the funeral
- Assemble all the person's financial papers
- Obtain current addresses for the beneficiaries

### How can we assist you?

- Notify the beneficiaries of their interest in the Estate
- Calculate beneficial entitlements and advise you in respect of any potential claims against the Estate
- Complete and file the Inheritance Tax Account; advise you of the available reliefs and exemptions; how you can finance any tax due and arrange the payment
- Prepare the formal documents to apply for the Grant of Representation
- Collect money and assets and settle any debts or expenses
- Finalise the income tax affairs and settle any outstanding income tax liability
- Arrange for the placement of Notices in order to protect you against personal liability
- Trace missing beneficiaries
- Deal with the transfer or sale of any property owned by the deceased
- Prepare Estate Accounts for your approval which will provide the executors and the beneficiaries with a full picture as to how the Estate had been administered

For more information please contact us on: 020 7584 7557

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