



## What does an Executor have to do?

Few things are urgent, and you definitely don't have to organise a formal reading of the Will (unless you really want to). But even with a really simple Will, an executor might need to provide the following services, either yourself or through relevant professionals.

1. Put a notice in the newspaper – not essential, but it lets those who are interested know about the death.
2. Check to see if there are any specific instructions regarding the funeral, and make the necessary arrangements.
3. Advertise for creditors of the estate.
4. Advise relevant financial institutions to guard against unauthorised use of bank accounts.
5. Take reasonable steps to protect valuable assets – if you need to, remove all cash and valuables for safe keeping.
6. Obtain an authority to administer the estate – either a Grant of Probate, or Letters of Administration if there is no Will.
7. Pay all debts, such as creditors, funeral expenses, income tax, fees for administering the estate and out-of-pocket expenses.
8. If you need to, consider seeking emergency financial assistance to help the family.
9. Inform the beneficiaries of their entitlements under the Will.
10. Finalise income tax returns up to the date of death and for the estate.
11. Establish Trusts – these are needed if the beneficiary is under 18 years of age, mentally incapable, or if there are specific instructions in the Will.

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