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ESTATE/TRUST ADMINISTRATION: WHEN A LOVED ONE BECOMES INCAPACITATED OR DIES

Our firm will guide the fiduciary (whether an Agent under a Durable Power of Attorney, a Personal Representative under a Will, or a Successor Trustee under a Trust) at each step so that you fully understand the role and duties required of you. This way we can help ensure that the administration of the estate or trust will be handled in an efficient and organized fashion. Our process begins when you meet with us to help gather specific information about the estate or trust at issue.

Below is a link to "Estate/Trust Administration Questionnaire." Please complete this form on behalf of the person who has died or has become incapacitated as completely as possible. The Questionnaire will help us to record all of the estate information in one place. While we ask that you attempt to complete the Questionnaire as thoroughly as possible before your initial meeting with us, we certainly understand that this can be an overwhelming task and that you may not have ready access to all of the information that we are requesting from you before our initial meeting. Accordingly, we are happy to assist you in completing the form during and after our initial meeting if you are unable to fully complete it before we meet.

Please see the "Estate/Trust Administration Help Guide and Checklist" which is available for download on our website, in the Forms section. We have prepared this document as an educational tool for our clients to acquaint them with some of the basic tasks and legal concepts involved in estate and trust administration and encourage you to review this document both before our initial meeting and during the administration process. We are hopeful that you will find this document to answer many of the basic questions you may have about the process and, as the title implies, to serve as a resource guide to you as you navigate your way through the estate or trust administration process.

To assist you with gathering the information, please download the "Document Checklist" on the Forms section of our website for your convenience. Having as many of the items on this list as is possible from the beginning of the process will greatly facilitate the process and reduce the fees and costs that may otherwise be involved.

The goal of our first meeting is to gather as much information as possible, which will save you time and expenses. While we charge a consultation charge for our initial meeting with you, we generally charge on an hourly basis for our subsequent services in assisting you in these administration matters.

Please see the Forms section of our website and download the Estate/Trust Administration Questionnaire.

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