

EXECUTOR GUIDELINES

If you have been nominated by someone as an executor under a will, there are certain obligations as an executor to deal with the estate of the deceased person.

What are the duties of an executor?

- Ensure that all property and valuables are properly secured, insured and listed for the purpose of distribution. Such items include land, shares and bank accounts and it is therefore important that relevant financial institutions are contacted for the purpose of collecting all relevant information.
- Forms must be completed for both the Revenue Commissioner and the Probate Office to obtain the "Grant of Probate".
- Where a social benefit was claimed it is important that the Department of Social Welfare is contacted to ensure that there is no overpayment of the relevant benefits also. We can complete the relevant forms on your behalf.
- It is necessary to go through the deceased's papers to help identify the liabilities and assets attached to the estate. Such information is required to obtain a Grant of Probate.
- A Grant of Probate is a document which allows the executor to collect all assets of the deceased and administer the estate. In a small number of cases, however, a Grant of Probate is not necessary. *At Sherwin O'Riordan we are available to advise your executor on the best course of action to take in respect of your Will and even complete the process on their behalf.*
- Ultimately, it is the responsibility of the executor to prepare the estate for distribution in accordance with the deceased's wishes as stipulated within the will, and then distribute them accordingly. *We endeavour to ensure that we are available not only as a guiding hand through the process, but also to complete the tasks where required.*

Sherwin O'Riordan are available to help executors with the considerable administrative detail involved with administering an estate, and can offer expert advice on any issues which may arise. Our fees are very competitive, however where we see the difference is in our attentive service and experience in dealing with the administering estates which can be difficult on many levels. We endeavour to ensure that your wishes are carried out as effectively as possible for the benefit of both your beneficiaries and your executor(s).

However, commonly, the executor may avail of professional help to aid this process. We understand that this is a complex and often confusing time for the executor, and can provide assistance and guidance.

If you would like to discuss any of these responsibilities in detail, please do not hesitate in contacting us.

Yours sincerely
James Sherwin



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