



Questions FROM your executor

Accepting the role of executor is a significant responsibility, and it is crucial to gather all necessary information and consider your own capabilities, availability, and willingness to fulfill the duties involved. If you have any concerns or uncertainties, it is advisable to consult with an attorney for guidance and to fully understand the legal implications before making a decision.

When approached by someone who is requesting you to serve as their executor, it is important to gather necessary information and assess your suitability for the role. Here are some questions you may want to ask the person:

1. **Estate Details:** Can you provide me with an overview of your estate plan, including the assets involved, any potential complexities, and the overall goals you wish to achieve through your estate plan?
2. **Specific Duties:** What specific tasks and responsibilities would you expect me to undertake as your executor? Understanding the scope of the role will help you determine if you are comfortable fulfilling those duties.
3. **Legal Documentation:** Have you prepared a will or trust? It is crucial to ascertain whether the person has legally documented their wishes and whether you will be named as the executor in the appropriate legal documents.
4. **Attorney Contact:** Have you consulted with an attorney regarding your estate plan? Understanding whether the person has sought legal advice and engaged an attorney can provide assurance that their estate plan is properly structured and legally sound.
5. **Beneficiaries:** Who are the intended beneficiaries of your estate? Understanding the beneficiaries and their relationships can help identify potential conflicts or challenges that may arise during the estate administration process.
6. **Assets and Liabilities:** Can you provide a comprehensive list of your assets, debts, and liabilities? It is important to have a clear understanding of the estate's financial picture to effectively manage the administration process.
7. **Other Executors or Professionals:** Are there any other executors or professionals involved in your estate plan, such as co-executors, trustees, or accountants? Understanding the roles and responsibilities of other individuals involved can help you evaluate the level of support and coordination required.
8. **Compensation and Expectations:** Are you planning to compensate me for serving as your executor? It is important to discuss any expectations or arrangements regarding compensation to ensure clarity and avoid misunderstandings.