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Estate Planning

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HOW TO CHOOSE AN EXECUTOR

- 1- What is an Executor? – The person who administers your estate at death and follows your Will
- 2- Executor – the biggest job is to sell your house after death.
- 3- Local ideal
- 4- Contents of your home – select, sell, donate, or discard items
- 5- Spouse then adult children (solo or joint) – job share – spouse may renounce or resign, as may a child
- 6- Trustworthy, organized, “get it done” person
- 7- If no family member available – look to friends, colleagues, attorney, accountant, or bank trust company
- 8- File final income tax return with your accountant, possible estate/inheritance tax return, account for estate assets in and out on spreadsheet – financial acumen important
- 9- Courtesy conversation with potential Executors
- 10- Best available choices

To learn more or schedule a free consultation, click here to get started today:

<https://www.irinashea.com/our-process>

