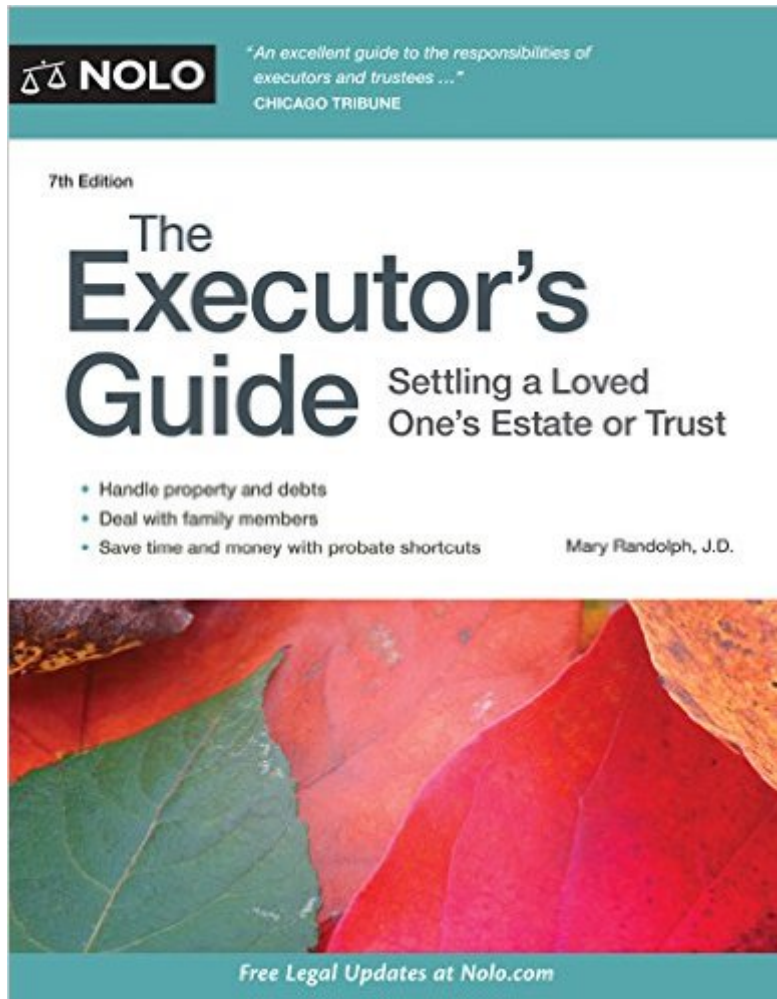


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# Executor's Guide, The: Settling A Loved One's Estate Or Trust



## Synopsis

The step-by-step guide to serving as an executor If you need to wrap up the affairs of a loved one who has died, you may feel overwhelmed—especially when you’re grieving. But you can do it, and this book will show you how. A roadmap to follow. The Executor’s Guide will lead you through an unfamiliar land of legal procedures and terminology. You’ll learn what to do right away and what can wait. Find help on:

- preparing for the job of executor or trustee
- the first steps to take
- claiming life insurance, Social Security and other benefits
- making sense of a will
- what to do if there is no will
- how to determine whether probate is necessary
- filing taxes
- probate court proceedings
- dealing with family members
- handling simple trusts
- working with lawyers, appraisers, accountants, and other experts

State-specific information. The 7th edition contains updated tables outlining key points of each state’s laws, the latest information on estate taxes, plus worksheets that help you stay organized. Applies in all states except Louisiana.

## Book Information

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Planning > Wills #8 in Books > Law > Estate Planning > Estates & Trusts #10 in Books > Law > Legal Self-Help

## Customer Reviews

This book was very useful as an introductory text for executors dealing with the most common kind of wills and other matters of testate. It covers ordinary probate and the most common variations. These matters vary state-by-state of course, but if you don’t have the good fortune (in a manner of speaking) to live in California or New York, you won’t find many monographs written on probate etc in your own state. The author does a very good job of covering the general (Uniform Probate Code

& the most common customs in the several States), and she makes well-selected references as well to salient and significant oddities in particular states, with tables etc that make this sort of thing easier to grasp. I recommend Hughes' and Klein's "Executor's Handbook" as well, and in fact it might be a bit easier to read than one first. But both are of great help and in difficult matters such as probate (for laypersons, anyway, who are the readers intended for the books) it's best to get the perspective offered by at least two sources; you'll unlikely want to pay two lawyers (and unless it's a very simple estate, with no possibility of being contested, you'll want a lawyer), so avail yourself of these books.

Have only read excerpts from this book so far, but it has already helped me immensely. I felt lost and overwhelmed by the task of being Executor, but the book reduced it to human scale and laid a series of small, achievable tasks. Right off the bat, learned that the Estate was considered "small" and therefore qualified for a simplified probate process. That alone justified the purchase price!

Unfortunately, I needed this book sooner than I had hoped. I read it cover-to-cover as I flew across country to begin dealing with an aunt's estate. It prepped me for how much work was in my future. However, as the author states many times, there are different rules/regulations/forms/procedures for every single state. Despite feeling knowledgeable, the state of Virginia still threw some curveballs at me. I HIGHLY recommend this for every family that has an estate or trust to be handled.

Found this book at my local library. It was out of date. Went to to order current copy. Just what I need to get my papers in order. And particular for my family after I am gone. It lays everything out very specifically and explicitly for even this novice. Starts with what to do the first day, gives you information on how to title your holdings, many cross references. How I set things up whether it is in a trust or in a will. I don't have a lot, but this book will give guidance to my heirs. Well worth the price.

I bought it to make sure that my trust is in order; my final arrangements clear; and learned many new things to assist my family after I am gone. Even an excellent trust attorney leaves out items-you can read it here.

I am executor and trustee for an estate. This book was very helpful. Gave me a lot of good information and I refer to it a lot!

Thorough, thoughtful, and incredibly helpful. After having to experience settling an estate without this resource, I can say, without hesitation, this book is invaluable. I have already started to use it to prepare for my next duty as executor of a loved ones estate.

I was feeling overwhelmed at the prospect of being an executor and buying this book has REALLY helped my stress level. It answered questions I had, pointed out things I wasn't aware of and even though that time hasn't arrived yet I feel I'm no longer flying blind.

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