

GUIDE WHAT DO I DO WHEN A LOVED ONE DIES?

When a loved one passes, the Personal Representative (also known as the Executor) named in their Will, or the Successor Trustee of their Trust has important decisions and opportunities to address. These obligations need to be addressed within the first 30 to 90 days after death. These responsibilities are related to taxes, creditors, and the assets of the estate. We recommend the Personal Representative or Trustee schedule a complimentary consultation with our Estate Settlement team to review these responsibilities.

Below is an overview of the process our team uses for the administration of a person's estate:



Our Estate Settlement Team would be honored to guide your family through this process.