

Duties of Executors



If you are an Executor in a Will you are responsible for ensuring the deceased's wishes are carried out in accordance with their Will. To ensure this happens, all executors must agree on every decision.

As an executor you have a duty to carry out certain tasks. These notes are designed to give a summary of the initial steps which should be taken as soon as reasonably possible after a death. If you are in any doubt, please feel free to contact us and we will help you through the process.

Registering the death

This is usually carried out by a family member or by the person who is arranging the funeral. To do this, contact the Registry Office in the area where the person died and book an appointment to register the death and obtain the Death Certificate. Ideally this needs to take place within 5 days of the death.

Arranging the funeral

The first thing to do when arranging a funeral is to speak to us to check the Will for any funeral wishes. Secondly, check to see whether there is a prepaid funeral plan in place. You or a family member will then need to contact a funeral director to make the arrangements.

Notifications

Gather together all papers regarding the deceased's property, bank and savings accounts, investments, pensions, debts, life assurance, etc. You will need to notify all the relevant companies and authorities of the death, as soon as possible.

Contact Steeles Law

Depending on what the deceased's estate comprises, you may need to apply for a Grant of Probate. This is a document issued by the Probate Registry authorising the executors to deal with the estate. Occasionally it is not necessary to apply for a Grant of Probate but it is worth checking with Steeles Law to make sure.

For assistance here are the details of the local registry offices.

Depwade (Diss) Register Office

Council Offices, Market Hill,
Diss, Norfolk IP22 4JX
Tel 01379 642192
registration.diss@norfolk.gov.uk

Norwich Register Office

The Archive Centre,
County Hall, Martineau Lane,
Norwich, Norfolk NR1 2DQ
Tel 0344 800 8020
registration.norwich@norfolk.gov.uk

Thetford Register Office

King's House,
King Street, Thetford,
Norfolk IP24 2AP
Tel 01842 754115
registration.thetford@norfolk.gov.uk

Gipping and Hartismere (Stowmarket) Register Office

Milton House,
Millton Road South,
Stowmarket, Suffolk IP14 1EZ
Tel 01449 612054
gipping.registrars@suffolk.gov.uk

Valuation of the Estate

You will need to calculate the value of the deceased's estate for probate and Inheritance Tax purposes and to work out whether there are any debts which need paying.

At Steeles Law we understand that administering a Will could be a daunting process which is why we are here to help you. Our practitioners have taken the time to gain additional skills in this area and are members of the Society of Trust and Estate Practitioners (STEP).

If you would like our help with administering an estate or if you have queries regarding the above please feel free to contact us.

Finally, within your pack you will find information on Inheritance Tax, making a Will and Lasting Powers of Attorney. Please take the time to read these factsheets. It is important to us that the affairs of all of our clients and contacts are in order. With this in mind, if you would like us to prepare a Will for you or discuss other estate planning issues please do get in touch.

Here are a few comments made by our clients and the profession

"We have always appreciated Steeles' attention to detail and clarity."

Mr & Mrs W, Client Questionnaire

"Unfailingly efficient, helpful, and sympathetic on every occasion on which I've needed advice...I'm very grateful."

Mr M, Client Questionnaire

"Thanks for your understanding, caring way you dealt with our Will. We are very pleased and happy with the way it has all been sorted out for us. Thank you."

Mr & Mrs M, Client Questionnaire

"Impressive, sensitive, efficient and proactive."

The Legal 500, a leading independent guide to the legal profession.

Email: probate@steeleslaw.co.uk

Tel: Norwich 01603 598000, Diss 01379 652141 or
London 020 7421 1720

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Lawrence House,
5 St Andrews Hill
Norwich NR2 1AD

St Nicholas House,
3 St Nicholas St,
Diss IP22 4LB

154 Bishopsgate,
London EC2M 4LN

Keep up to date with your responsibilities

From time to time the rules governing Wills and estate planning change.

It is important that you are aware of your responsibilities as an executor. Therefore we would like your permission to write to you with updates and changes.

Please complete the form enclosed within this pack.