KINGS COURT TRUST
YOUR PARTNER THROUGH PROBATE

Executor review checklist

To be used during client meetings

The role of an Executor

- ☐ Discussed the role of an Executor
- ☐ Provided client with A5 Executor card
- ☐ Emailed client a copy of the Executor guide

The liability of an Executor

- ☐ Informed client of responsibilities and risks of the role
- ☐ Discussed whether the client's current Executor(s) have the time, expertise and energy to deal with all these aspects of estate administration?
- ☐ Introduced client to how Kings Court Trust can help Executor(s) when they pass away

Client details

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Notes

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The cost of administering an estate

- ☐ Warned of dangers of percentage and/or time and expense fees
- ☐ Discussed Kings Court Trust's fixed fee pricing

Pricing example on a £700,000 estate:

4% percentage fee = £28,000, plus £5,600 VAT (not fixed)
KCT bespoke quote* = £7,000 (fixed fee)

**Calcluated based on the work involved rather than the value of the estate. Every KCT quote is bespoke to the estate.*

Is my client named as an Executor in someone else's Will?

- ☐ Determined if they know whether they are named as an Executor in someone else's Will
- ☐ Are there co-Executors?
- ☐ Is a professional Executor named in the Will?
- ☐ Where is the original Will?
- ☐ Who are the beneficiaries?

! Early knowledge of this will mean that your client should contact you first, ensuring you and your client keep control of the estate. It will also give you the opportunity to turn the beneficiaries into new clients.

Need support? Contact Kings Court Trust

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