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The Executor's Handbook: A Step-By-Step Guide to Settling an Estate for Personal Representatives, Administrators, and Beneficiaries

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1 of 1 people found the following review helpful. Not too bad. By James V. Mihelilc Pretty much told me everything I already knew. But if you are a first time, this would be the thing to get to, at least, provide some sort of order in the process of closing out an estate and filing the appropriate forms. But be sure and check with your State Probate Office first. 4 of 5 people found the following review helpful. What can I expect to deal with By James Harper This book will give you insights into what to expect when "the event" occurs. It should be read before you except the responsibility. An executor is not just another job. 30 of 30 people found the following review helpful. Short, sweet, and to the point By Jeff Lippincott After reading this book you can probably be an executor for an estate without hiring an attorney (assuming no legal documents have to be prepared or filed in court). I found this book in the reference section of the Westfield Pubic Library (NJ) along with its companion book: A Family Guide to Wills, Funerals Probate

(ISBN: 081604550X). This book was written for an executor to read, and the companion book concerned much of the same material but for the decedent to read before he or she dies. I thought this book was great, and that it will help an executor gain a grasp of his or her responsibilities when administering and closing a decedent's estate. It is written without legal jargon. Have you ever had to administer an estate and gone to an attorney for help? Did you expect the attorney to tell you about your duties and delegate as much of the work to you as possible? And did you find the attorney did a lot of work you think you could and should have done? Well, if so, then this book probably could have helped you talk to the attorney and have more worked delegated to you. This book is as comprehensive as it needs to be to educate an executor about his or her duties. When those duties can be complicated, the authors explain the basics so an attorney can be consulted to provide legal services. Keep in mind that many estates can be settled without any legal help being needed. Thus, I recommend an executor read this book before ever seeking an attorney for help, guidance, or services. The edition of the book I read was hardbound and very pretty. There was an index of terms in the back of the book. However, I would have liked the book better if there had been a glossary of terms back there, too. Don't worry that the book doesn't have your state in its title. It is written so it is applicable to executors in all 50 states. I found the book to be deficient in covering (failed to cover) the various tax forms (federal estate income; state estate income) that must be filed. They mention them, but I would have liked the book better if more had been written about them. Filing the tax returns is often the most complicated aspect of doing executor work. Most of the other things just take time.

Here is the only concise step-by-step guide specifically for estate executors. Although an individual with substantial assets generally nominates in his or her will a bank or trust company as estate executor, the vast majority of people nominate a friend or relative, who often finds the task bewildering, if not daunting. From anatomical gifts, death certificates, contested wills, probate courts, and taxes, taxes, taxes to the successful and efficient closing of the estate, this handbook guides the way through the potential labyrinth of estate law. In plain, unambiguous language, Theodore E. Hughes and David Klein provide more than a reassuring manual. Beginning with a look at the ideal qualifications for an executor (also called a personal representative), the authors examine the procedures for determining whether full probate is required; understanding the provisions of the will; managing or liquidating the testator's assets; dealing with beneficiaries, creditors, and probate court; and handling the testator's income and death taxes. Covering every aspect of the executor's duties, this handbook even includes special situations like collecting private employer pension benefits, settling a living trust, and estate planning for survivors. Tables include a rundown of probate vs. nonprobate assets and variations in state probate laws. Definitions of legal terminology, sample legal forms, and a look at hidden funeral expenses round out this comprehensive and helpful legal guide. Although other books deal with wills, funerals, and probate, no other book fully examines all the executor's duties. Whether nominated by the testator or appointed by the probate court, every executor will find that this book helps unite the many knotty problems of settling and closing an estate.

From Library Journal An executor is a person appointed in a will to carry out the instructions and wishes of the deceased. Often the tasks involved are cumbersome, complicated, and time-consuming. This Handbook outlines the duties and responsibilities of the executor and provides a walking tour of the procedures that settle an estate. There is no skimping on the basics here. The authors understand what a first-time executor needs to know and present that information in plain English. Coverage includes a thorough explanation of what an executor does, instruction on dealing with the deceased's assets and liabilities, and advice on administering probate. In addition to the competent, methodical text, they offer tables of state income tax rates, intestacy laws, state-by-state probate requirements, and executor's fees. Highly recommended for libraries with estate-planning collections. Joan Pedzich, Harris, Beach Wilcox, Rochester, Copyright 1994 Reed Business Information, Inc. "Highly recommended..." - Library Journal"