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Administering Wills and Trusts: A Layperson's Guide For Executors and Trustees of Mid-Sized Estates (Truth About Estates) (Volume 2)

Jackie Ann Patterson

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ADMINISTERING WILLS AND TRUSTS




A LAYPERSON'S GUIDE FOR
EXECUTORS AND TRUSTEES
OF MID-SIZE ESTATES

JACKIE ANN
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Practical how-to guide lists the steps to transfer an estate to the beneficiaries of wills, trusts, intestate (no will) estates, and Pay On Death accounts. This book is not a replacement for personalized legal, financial, or tax advice. Instead it offers the executor or trustee of a small to medium estate background information often not explained in detail by lawyers and accountants. Covers the complete process including: Funeral plans Tips for surviving probate Relaxing news about estate tax Help to avoid family fights while dividing personal possessions Guide to shutting down active stock trading accounts Suggestions for modern issues such as computers, frequent flyer miles, intellectual property Productivity and management tips Readers also get bonus spreadsheets and letter templates to give the administrator a head start with: Inventorying assets, personal possessions, liabilities Writing letters to financial institutions and credit agencies Tracking administrator expenses The author, Jackie Ann Patterson, is an engineer, manager, and stock trader who acted as the family administrator for over a decade. She settled several estates and planned a few trusts. This book came about because of requests and many questions from family and friends about wills, trusts, probate, and estate tax.

About the AuthorJackie Ann Patterson is not a lawyer, nor an investment adviser. She is an engineer, manager, and stock trader who acted as the family administrator for over a decade, settling estates and planning trusts. This book came about because of requests and many questions from family and friends about wills, trusts, probate, and estate tax.