

Executor Assist

Personal
assistance
for executors
of an estate



About Australian Executor Trustees Limited (AET)

We are a specialist provider of wealth transfer, wealth management and wealth preservation services, available through our national network of offices in Adelaide, Brisbane, Melbourne, Perth, Sydney and Mount Gambier in regional SA.

We have a proud history of providing estate administration, estate planning, trustee, superannuation and investment services.

We continue to offer the personal and professional attention to our clients that has been the hallmark of our business for more than 120 years.

Our parent company is Australian Wealth Management Limited which is listed on the Australian Securities Exchange.

What is Executor Assist?

If you have been named as an Executor of a Will, you may already be aware of the diverse range of duties and responsibilities that this entails.

Indeed, you may have concluded that you will require assistance to carry out some, if not all of those duties and responsibilities when the time comes.

Executor Assist, offers just that, so if you don't have the time or expertise to handle such a role, then our Executor Assist service is for you!

Executor Assist allows you to retain control of the estate administration process but without needing to understand and interpret the complex legal, administrative and taxation requirements that you could otherwise be faced with as the Executor.

Acting as the Executor's agent, we will release you from the burden of preparing formal documentation and the need to deal with the Court and the many organisations, government bodies and individuals involved in the estate administration process.

Executor Assist can also help if you are appointed as the Administrator of a deceased estate where there is no Will.



How we can help?

The Executor Assist service enables you, as the Executor, to retain control of the estate administration process, while we carry out the following duties on your behalf:

- Arranging the application for Probate
- Collecting assets and paying outstanding accounts
- Selling or transferring assets
- Determining superannuation entitlements
- Making distributions and preparing financial statements
- Registering change of name re jointly owned assets
- Determining cost bases and acquisition dates for capital gains tax purposes
- Communicating with beneficiaries.

Should you wish to administer the estate yourself, after Probate issues, we are happy to offer our limited 'Probate Only' service for a flat fee.

Whichever level of service you choose, we provide you with a dedicated Client Service Adviser, so you have one contact person who will work with you until our assigned duties are completed.

What are the benefits of Executor Assist?

- Experience and expertise – we have been administering estates and trusts for more than 120 years.
- You can substantially reduce the risk of personal liability by having us act as your agent.
- You retain control of the estate administration process and are involved in decision making.
- Regular progress reports are provided along with full financial recording and reporting.
- You have a dedicated staff member who is committed to providing the highest level of service.

Executor Assist is just that – it provides assistance to the Executor

- You receive a fixed up-front quote for our fees.
- We require no up-front payment to cover our fees or anticipated outlays.
- The estate earns interest on all credit balances held in our trust account pending distribution.

What does it cost?

Fees for the Executor Assist service are determined and agreed up-front, based on the volume and complexity of the work to be undertaken.

We will provide you with a fixed price, obligation-free quote, in writing, setting out the duties to be undertaken and disclosing all anticipated outlays.

Next steps

If you have been named as the Executor of a Will for a family member or friend, when the time comes for you to act, we invite you to discuss your situation with us.

After an initial assessment, if appropriate, we will arrange to meet with you to discuss your needs and requirements in detail and provide an obligation-free fixed quote for the level of service you decide on.

Until you formally engage us to act on your behalf, there is no cost to you and no obligation to use our services.

To find out more about how our Executor Assist service can help you, please contact your local AET office on **1800 882 218** or visit www.aetlimited.com.au

Australian Executor Trustees Limited

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Part of Australian Wealth Management

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