



Hi Howard,

I understand that the legal terminology surrounding estate administration can be overwhelming and confusing. That's why I want to provide you with some guidance to help you understand what Passing of Accounts means and why it's important.

The passing of accounts is a legal procedure that takes place when an executor or trustee under a Power of Attorney or Trust Document submits a financial statement to the court for review. This statement outlines all of the transactions related to the estate or trust, including any income earned, expenses paid, and distributions made to beneficiaries.

The purpose of the passing of accounts is to ensure that the executor or trustee has acted in accordance with their duties and responsibilities, and that the beneficiaries have received their fair share. The court will review the statement and either

approve it or request further information or adjustments.

If you are an executor or trustee, it's important to understand the requirements of passing of accounts and to ensure that you keep accurate records of all transactions related to the estate or trust. If you are a beneficiary, the passing of accounts provides you with an opportunity to review the financial statement and ensure that you have received your fair share.

My Team of experienced legal professionals and I can guide you through the process of passing of accounts and ensure that your interests are protected.

I invite you to [set up a Zoom](#) appointment with me to discuss your Passing of Accounts needs.

[Schedule A Consultation](#)

[Visit My Website](#)

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You

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