

## Our Story

On December 23, 2020, my eldest sister, Mary Susan passed away from ovarian cancer. My sister Patty and I were appointed as co-executors in Sue's Will. I found out very quickly that the duties of the executor were significant and involved the resolution of all of Sue's worldly possessions and intentions. It was a very difficult time for all of us in the family. As I began taking care of the estate it became very apparent that the process was going to be long and complicated.

The very first thing we found out was that the attorney that did Sue's estate planning did not service the area of her home of residence for the probate phase. We were very fortunate to get a fantastic attorney that helped guide us through the maze. Estate Attorneys, Financial Planners and Certified Public Accountants are all very knowledgeable about

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their roles and responsibilities. Executors however, are given extensive duties and may have little to no knowledge of the process, or what is required to handle an estate in an efficient and professional manner.

It was at this point that I realized there was a need for executor services to help families and executors perform the business side of an estate. This would provide the family the time they need to deal with the emotion and stress caused by losing a loved one. I founded Executor Services LLC in September of 2021 to provide executors with a full-service resource to assist them in the execution of 'their' duties.



Charles J. O'Neill Jr.  
Founder and CEO

## About Executor Services

We provide expert assistance to executors who wish to maintain control of an estate while delegating the execution of tasks to us. In return, we provide the executor with estate guidance, timelines, formal documentation, and reports. These artifacts facilitate communications with beneficiaries and attorneys to efficiently administer the estate avoiding delays, disputes, and penalties.



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# EXECUTOR

— SERVICES —

**We Guide and Assist in the Performance of Executor Tasks.**

Expert support for executors based on your estate's unique needs.



## Role of the Executor

An executor is the person selected to oversee and administer the settlement of an estate. This role requires a broad range of skills, attention to detail and a significant commitment of time. Depending on the complexity of the estate and potential family conflicts or disagreements, the process will take months or years. While all legal matters are handled by estate attorneys and investments by financial planners, there is a considerable amount of administrative work that is inevitably placed on the executor.

## It's a Time-Consuming Process



### 600 hours

is the average time commitment required by an executor to complete all administrative tasks involved in settling an estate.

### 14-16 months

is the average time required to settle an estate. Large estates greater than 5 million take 3 times as long.



## We Provide Executors with Direct Support in Performing 'their' duties:

- Dedicated executor team a call or email away
- Execution of day-to-day administrative tasks
- Expertise to guide you through the process
- A network of trusted providers to expedite services needed for the estate
- Develop, monitor, and adjust estate timelines and milestones
- Monthly estate summary and documentation provided to the executor
- Cyber Security/Identity Theft mitigation

## Here's How We Help

### Find

Documents (Insurance, Legal, Financial, etc.)  
Account numbers, logins, and passwords  
Real estate Deeds and contracts  
Assets and debt  
Credit and online accounts  
Tax documentation

### Secure

Bank and financial accounts  
Online accounts and update passwords  
Archive and close Social Media accounts

### Manage

Estate debt, payments, and receipts  
Appraisal of properties and valuables  
Coordination of repairs and cleaning of property  
Coordination of the sale of property  
Form completion and submission  
Creation of estate inventory  
Rental and commercial property



Financial



Assets



Real Estate



Documentation