

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.



Executor Options

Executor Services can:

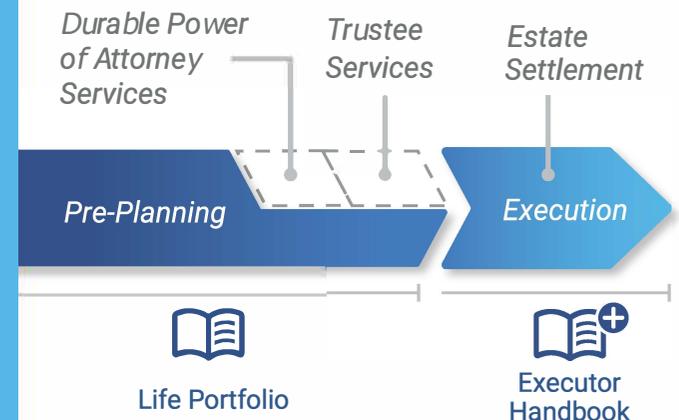
- Serve as the "Named" Executor in your will.
- Serve as a "Named" Co-Executor in your will.
- Serve in a support role for overwhelmed, time-limited, or out-of-state executors.
- Serve as the Executor for estates that don't have someone to appoint or wish to have an independent 3rd party serve in that capacity.

Never before has there existed this kind of "Value Add" service especially cultivated to assist you the testators.

Here's Why to Plan *Full Spectrum Support*

Executor Services provides our clients with options to assist with planning, transitions, and estate settlement. We can serve in a variety of capacities throughout the process. We can be appointed as the Executor, appointed as a Durable Power of Attorney or as a Trustee for a trust. These are positions that must be filled as part of a good estate plan that covers all a family's needs as we navigate life. Our Pre-Planning Services are unique packages that have multiple purposes. The main purpose is to prepare your Power of Attorney, Trustee and/or Executor to have a full understanding of the scope of an estate and have all the details regarding a loved one's life. A supplemental and perhaps more immediate purpose is targeted to organize and simplify our own lives. We will help you organize and protect all that you have worked for. Securing your accounts will also help protect you from identity theft or fraud.

Services Life Cycle



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

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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 assist 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 offer executors a full-service resource to assist them in the execution of their duties.



Charles J. O'Neill Jr.
Founder and CEO

About Executor Services

Executor Services LLC was founded to support families in navigating the complicated and stressful environments that are Estates. There are many parts to the world of estates, from estate planning to estate settlement. The process itself is complicated and even more complex to implement, especially when the person responsible may be lacking knowledge and experience.

Executor Services is the solution!



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ExecutorServices_Brochure:v2.0



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**WELCOME TO THE FUTURE OF
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SUPPORT**

**Expert support based on your estate's
unique needs.**

