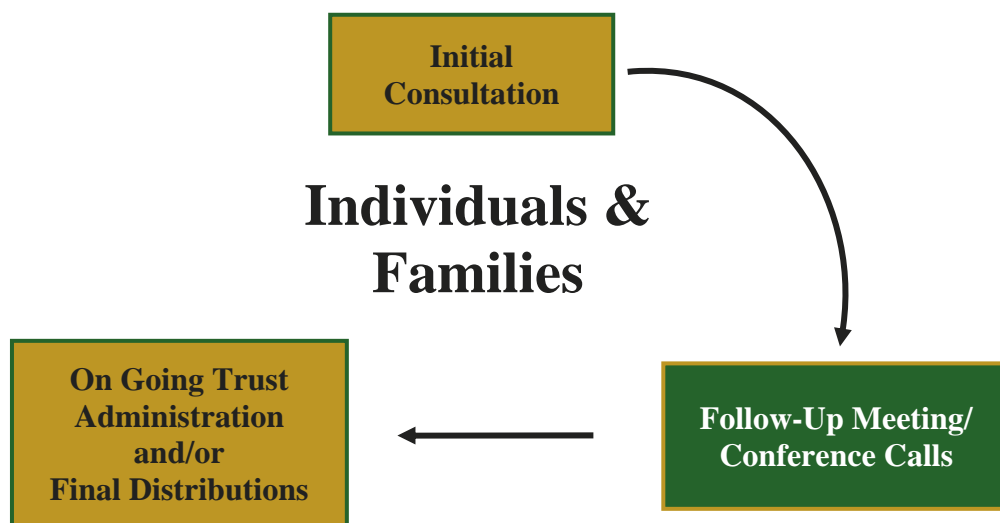




# Estate & Trust Administration

Estate and Trust Administration is the process that a fiduciary goes through to carry out the wishes expressed in a will or trust. At Eagle & Fein, we can assist and counsel the appointed fiduciary at all phases during Estate and Trust Administration. We take the stress out of navigating the process so your family can focus on what is important to them. We ensure trust assets are properly accounted for, appraisals are obtained, tax filing requirements are met, and distributions of estate and trust assets are made in a timely fashion while maintaining regular communication with the family. We have the knowledge combined with the compassion that is required to address the sensitive issues that can arise during Estate and Trust Administration.



# Our Process

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## Administration of a Will Centered Plan Includes

- Filing a petition for probate of the Will with appropriate court to appoint the Personal Representative
- Preparing and filing inventory of estate assets
- Paying the deceased person's debts
- When necessary, filing tax returns
- Preparing and filing a final accounting with the Probate Court
- Distributing assets according to the terms of the Will

## Administration of Trust Centered Plan Includes

- Appointment of a Successor Trustee which occurs without petition to a court
- Identifying and valuing assets
- Paying deceased person's debts
- Filing tax returns, if required
- Distributing assets according to the terms of the Trust

When a family member passes away, contact Eagle & Fein to set up an appointment to learn about the fiduciary's responsibilities and what we can do to help your family navigate the steps of administering the will or trust. We work with both fiduciaries and beneficiaries to ensure a smooth transition of assets through final distribution.

