



Looking for a Good Executor?



Choosing the right person today can make a lasting difference tomorrow for the people you love.

Selecting an executor is one of the most important decisions you'll make as part of your estate plan. This individual will be responsible for carrying out your wishes, caring for the details of your estate and helping your loved ones through a significant transition.

While this responsibility can seem overwhelming, choosing someone who is trustworthy, capable and willing to serve can bring peace of mind—for both you and your family.

What Does an Executor Do?

An executor serves as the personal representative of your estate. Depending on your circumstances, responsibilities may include:

- Gathering and protecting estate assets.
- Paying outstanding debts, taxes and final expenses.
- Working with attorneys, accountants and financial professionals.
- Communicating with family members and beneficiaries.
- Distributing assets according to the instructions in your will.
- Completing the legal process of settling your estate.

Many of these responsibilities can be handled with the assistance of experienced professionals, so your executor doesn't need to have every answer—they simply need to be dependable and willing to follow through.

Before You Make Your Decision

Before naming someone as your executor, consider having an open conversation with them. Ask if they would be comfortable serving in this role and explain why you have confidence in them. Sharing your wishes in advance can help prevent confusion and provide reassurance when the time comes.

It is also wise to name an alternate executor in case your first choice is unable or unwilling to serve in the future.

A Decision That Reflects Your Values

For many families, estate planning is about much more than finances. It is an opportunity to care well for those you love and to ensure your values continue to guide important decisions. Choosing an executor who understands and respects those values can be one of the greatest gifts you leave behind.

HERE ARE FIVE QUESTIONS TO ASK YOURSELF:

- Is he or she available longterm?**
It is a process that often takes many months, even years. Can they carry it through to completion?
- Does he or she have the right temperament?**
It can be complex, stressful and require navigating both the personal and business aspects of the process.
- Is he or she honest and objective?**
Often, the role does not have independent oversight, so integrity and a non-biased perspective are vital. Will he or she honor your spiritual values?
- Does he or she have good organizational skills?**
The person chosen often will need to manage a diverse array of documents and tasks, even with planners like CPAs already in place.
- Is he or she willing to learn or study?**
Many estates include real estate, which must be sold. But, beyond that it may include collectibles and non-traditional assets. Can he or she embrace these unique complexities and learn on the job?

Do you have questions or are you looking for some counsel? Our planning team at Cru® Foundation may be able to help. Call 800-449-5454 or email: info@crufoundation.org.