



**PUBLIC TRUSTEE  
AND GUARDIAN**

# EXECUTOR ASSIST

## Services Available to Private Executors

Administering a deceased estate is a complex and time-consuming task, often requiring specialist legal, financial and administrative skills.

The Public Trustee and Guardian (PTG) currently provides will-drafting, estate administration and trust services to ACT residents only -

- where nominated in the will as executor or alternate/substitute executor;
- where nominated in the will by a private executor;
- where the executor renounces their appointment as executor; or
- where there is no will.

## Executor Assist – assistance to private executors

If you are appointed as a private executor in a will and prefer not to act in that capacity, or require help in administering an estate, PTG has several options that may assist you -

- appoint the Public Trustee and Guardian to assist you to administer the estate through Executor Assist; OR

- renounce your appointment as executor in favour of the Public Trustee and Guardian.

Executor Assist is designed to assist private executors with certain aspects of their role.

***If you require more information about our Executor Assist service please contact us, preferably before you commence the administration process.***

## What can you expect from us through Executor Assist?

Under Executor Assist, we will act on your behalf but will not assume the role of executor unless you renounce your appointment as executor in favour of PTG.

We can advise you on your responsibilities as executor including locating and contacting beneficiaries, applying for probate, preparing and lodging documents, dealing with property, preparing and lodging income tax returns and preparing trust deeds eg Deeds of Family Arrangement.

Our acceptance of appointment to assist you as executor is not automatic. Prior to accepting appointment, we will check the will and request that you provide information about any actions taken by you as executor at that point.



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Under Executor Assist, whilst we will provide the highest quality services, you remain responsible as executor for the estate administration.

The services provided through Executor Assist are for your assistance only and, where you seek our assistance in providing more comprehensive executorial services, we would only do so upon the renunciation of your appointment as executor and the appointment of the Public Trustee and Guardian in your place. In that regard our regular estate administration fees would apply.

### **What are the fees for Executor Assist?**

The ACT Attorney General determines the maximum fees that PTG may charge for its services. Fees are reviewed annually and an hourly rate (check current fees) forms the basis of charges for Executor Assist services. We will provide an estimate of costs depending upon which services you appoint us to do.

Additional expenses in the form of disbursements (eg probate application, newspaper advertisements and land titles fees as applicable) and other fees (such as legal fees or fees for conducting searches and other disbursements) may also apply, in addition to

a small amount for sundries. These will be explained at your first meeting.

### **What is the process for Executor Assist?**

If you are nominated as executor in a will, you will need to provide the name and date of death of the deceased person, details of the deceased person's assets and liabilities and a copy of the original Will. The executor will then complete an authority requesting PTG to assist in the estate administration.

PTG is unable to provide Executor Assist services if -

- the document is an informal Will;
- anyone other than the executor requests to apply for a grant of probate; or
- the deceased person died without leaving a Will.

Contact the Public Trustee and Guardian on **Ph 6207 9800** to arrange a meeting to discuss how we can help you through Executor Assist.