



GUIDELINES FOR SELECTING AN EXECUTOR

Choosing an individual (or individuals) to execute an estate plan can be difficult. These guidelines can help your clients navigate this area more easily.

An executor (or executrix) must be a trustworthy, reliable adult who can work well with surviving family members. He or she must be of sound mind and should be known for integrity. Here are a few additional guidelines for selecting an executor:

- Each state has different guidelines for executors from another jurisdiction. Get to know your state's requirements or consult an estate expert to help.
- Spouses usually serve on each other's behalf, but naming an alternate or successor is a good idea.
- Choosing someone with specific, relevant expertise is helpful.
- Secure the executor's agreement in advance and discuss the details of the will and distribution. Consider using two people and requiring joint signatures for safety's sake.