

## Instructions for Your Quicken WillMaker Will

### **WARNING**

This document was generated using an older—and potentially out-of-date—software program that may or may not agree with the laws of your state. We recommend obtaining the latest version in order to ensure this document's validity. To upgrade at a significant discount, please call Nolo at 1-800-728-3555, Monday through Friday, from 8:00 AM to 5:00 PM Pacific Time.

### **Before You Sign**

This section lists the steps to take before you finalize your Quicken WillMaker document and put it to use.

#### ***Review Your Document***

Read your will carefully. Is everything printed as you intended? Do you understand the meaning of every word? Do not sign your will unless you are completely satisfied with what it says.

### **Signing Your Will**

You must sign your will in front of two witnesses. The witnesses must be adults who are not beneficiaries of your will. That means that your witnesses cannot be named in your will to receive any of your property, even as alternate or residuary beneficiaries. Also, your witnesses should be easily available when you die, so it is usually best to choose witnesses who are in good health, younger than you are and likely to remain in your geographic area.

Here's what you need to do:

1. Tell your witnesses that you intend the document to be your will.
2. Initial and date the bottom of each page of the will. (Use just one of the blank lines for your initials. Your witnesses will use the others.)
3. On the last page of the will, in the blank lines of the section labeled "Signature," write the date, the city or county and the state where you are signing the will.
4. Sign your name on the signature line while the witnesses watch.

Your witnesses do not need to read the will before signing it themselves. Ask one of your

witnesses to write the date and signing location in the blank lines above the witnesses' signatures. Your witnesses should:

1. State that they understand that you intend the document to be your will.
2. Initial the bottom of each page of the will.
3. Sign their names on the signature lines under "First Witness" and "Second Witness."
4. Print their names and addresses on the lines below their signatures.

### **After You Sign**

Keep your will in a safe place where it can be readily found. Only the signed original is legally valid and can be probated. Do not sign more than one will; doing so may cause confusion after your death.

If you wish to give copies of your will to your executor or beneficiaries, print multiple copies of your completed will and distribute them unsigned. You can print these copies with Quicken WillMaker's "Duplicate" watermark feature, which is found on the Print dialog box. Store one unsigned copy with your signed will. If you need more copies later, you can either make photocopies of your unsigned will or you can print additional copies directly from Quicken WillMaker.

If there are major changes in your life, you should make and sign a new will and have it witnessed. Destroy the original of your old will and all copies. Changes that make it wise for you to make a new will include having or adopting a child, moving to another state, the death of anyone named in your will, a change of marital status and a significant change in the property you own.

### **A Note About Document Formatting**

In some Quicken WillMaker documents, hash marks [////] automatically appear at the bottom of a page. These marks are both a precaution and a legal necessity. In many legal documents, it is a requirement that a few lines setting out something of substance appear on the same page as the signatures. In others, the signatures, or sometimes other material, must simply be kept together on one page. These formatting requirements may result in a page break that leaves less than a full page of text on one or more pages of a document. The hash marks prevent someone from inserting additional language into the blank spaces after you have signed the document.

**If You Need Legal Advice, See a Lawyer**

Nolo, provider of legal content for Quicken WillMaker, publishes legal forms that are useful in many situations. But we can't tell you whether or not a form is right for you, given your circumstances. No general legal form is a substitute for personalized advice from a knowledgeable lawyer licensed to practice law in your state.

If you want advice geared to your specific situation, consult an expert in the relevant area of law. For example, if you want a lawyer to review your will, look for an estate planning expert. To find a lawyer in your area, you can begin with Nolo's Lawyer Directory at <http://www.nolo.com/lawyers>.

Quicken WillMaker Plus 2015 version 15.5

Will version 15.4.0.2016

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# **Will of Shirley A. Maurice**

## **Part 1. Personal Information**

I, Shirley A. Maurice, a resident of the State of Georgia, Paulding County, declare that this is my will.

## **Part 2. Revocation of Previous Wills**

I revoke all wills and codicils that I have previously made.

## **Part 3. Marital Status**

I am married to Eugene G. Maurice.

## **Part 4. Children**

I have the following children now living: Michael D. Maurice and Andrea L. Black.

## **Part 5. Grandchildren**

I have the following grandchildren now living: Asher T. Maurice, Avery J. Maurice and Jordyn D. Black.

## **Part 6. Disposition of Property**

A beneficiary must survive me for at least 45 days to receive property under this will. As used in this will, the phrase "survive me" means to be alive or in existence as an organization on the 45th day after my death.

If I leave property to be shared by two or more beneficiaries, and any of them does not survive me, I leave his or her share to the others equally unless this will provides otherwise.

My entire estate is all property I own at my death that is subject to this will.

I leave my entire estate to my spouse, Eugene G. Maurice.

If Eugene G. Maurice does not survive me, I leave my entire estate to my children Michael D. Maurice and Andrea L. Black in equal shares.

If Eugene G. Maurice and Michael D. Maurice do not survive me, I leave Michael D. Maurice's share of my entire estate to Asher T. Maurice and Avery J. Maurice in equal shares.

If Eugene G. Maurice and Andrea L. Black do not survive me, I leave Andrea L. Black's

## **Will of Shirley A. Maurice**

share of my entire estate to Jordyn D. Black.

All personal and real property that I leave in this will shall pass subject to any encumbrances or liens placed on the property as security for the repayment of a loan or debt.

### **Part 7. Custodianships Under the Uniform Transfers to Minors Act**

All property left in this will to Asher T. Maurice shall be given to Desiree K. Maurice, as custodian under the Georgia Uniform Transfers to Minors Act, to be held until Asher T. Maurice reaches age 21. If Desiree K. Maurice is unwilling or unable to serve as custodian, Andrea L. Black shall serve instead.

All property left in this will to Avery J. Maurice shall be given to Desiree K. Maurice, as custodian under the Georgia Uniform Transfers to Minors Act, to be held until Avery J. Maurice reaches age 21. If Desiree K. Maurice is unwilling or unable to serve as custodian, Andrea L. Black shall serve instead.

All property left in this will to Jordyn D. Black shall be given to David C. Black, as custodian under the Georgia Uniform Transfers to Minors Act, to be held until Jordyn D. Black reaches age 21. If David C. Black is unwilling or unable to serve as custodian, Michael D. Maurice shall serve instead.

### **Part 8. Executor**

I name Michael D. Maurice to serve as my executor. If Michael D. Maurice is unwilling or unable to serve as executor, I name Andrea L. Black to serve as executor.

No executor shall be required to post bond.

### **Part 9. Executor's Powers**

I direct my executor to take all actions legally permissible to have the probate of my will done as simply and as free of court supervision as possible under the laws of the state having jurisdiction over this will, including filing a petition in the appropriate court for the independent administration of my estate.

I grant to my executor the following powers, to be exercised as he deems to be in the best interests of my estate:

1. To retain property without liability for loss or depreciation.

## **Will of Shirley A. Maurice**

2. To dispose of property by public or private sale, or exchange, or otherwise, and receive and administer the proceeds as a part of my estate.
3. To vote stock; to exercise any option or privilege to convert bonds, notes, stocks or other securities belonging to my estate into other bonds, notes, stocks or other securities; and to exercise all other rights and privileges of a person owning similar property.
4. To lease any real property in my estate.
5. To abandon, adjust, arbitrate, compromise, sue on or defend and otherwise deal with and settle claims in favor of or against my estate.
6. To continue or participate in any business which is a part of my estate, and to incorporate, dissolve or otherwise change the form of organization of the business.

These powers, authority and discretion are intended to be in addition to the powers, authority and discretion vested in him by operation of law by virtue of his office, and may be exercised as often as is deemed necessary or advisable, without application to or approval by any court.

### **Part 10. Payment of Debts**

Except for liens and encumbrances placed on property as security for the repayment of a loan or debt, I direct that all debts and expenses owed by my estate be paid in the manner provided for by the laws of Georgia.

### **Part 11. Payment of Taxes**

I direct that all estate taxes assessed against property in my estate or against my beneficiaries be paid in the manner provided for by the laws of Georgia.

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## Will of Shirley A. Maurice

### Part 12. Severability

If a court invalidates any provision of this will, that shall not affect other provisions that can be given effect without the invalid provision.

### Signature

I, Shirley A. Maurice, the testator, sign my name to this document,

this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_,

at \_\_\_\_\_ (city or county, and state).

I declare that I sign and execute this document as my last will, that I sign it willingly and that I execute it as my free and voluntary act. I declare that I am of the age of majority or otherwise legally empowered to make a will, and under no constraint or undue influence.

Signature: \_\_\_\_\_

### Witnesses

We, the witnesses, sign our names to this document, and declare that the testator willingly signed and executed this document as the testator's last will.

In the presence of the testator, and in the presence of each other, we sign this will as witnesses to the testator's signing.

To the best of our knowledge, the testator is of the age of majority or otherwise legally empowered to make a will, is of sound mind and is under no constraint or undue influence.

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## Will of Shirley A. Maurice

We declare under penalty of perjury that the foregoing is true and correct,

this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_,

at \_\_\_\_\_ (city or county, and state).

### ***First Witness***

Sign your name: \_\_\_\_\_

Print your name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State: \_\_\_\_\_

### ***Second Witness***

Sign your name: \_\_\_\_\_

Print your name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State: \_\_\_\_\_



## **INSTRUCTIONS: Self-Proving Affidavit**

Your state allows you to make your will self-proving. Doing this has absolutely nothing to do with your will's legality—a properly signed and witnessed will is legal whether or not it is self-proving.

However, by making your will self-proving, you give the court additional assurance that the will was made by you. This may speed the admission of your will to probate and make things easier for your executor, especially if none of your witnesses can be located after your death.

To make your will self-proving, you and your witnesses must sign the attached affidavit (a written statement under oath) in front of a notary public. Then you should attach the affidavit to your will. Follow these steps:

1. Sign and witness your will exactly as described in the instructions accompanying the will.
2. Either have a notary present at the will signing, or find one later. Either way, you and your witnesses must personally appear before the notary and identify yourselves with a driver's license, birth certificate, passport or other official identification. (The notary can tell you which documents to bring.)
3. If the notary has his or her own form for making your will self-proving, use that form and follow the notary's instructions.
4. If you use our affidavit, put your name and your witnesses' names in the spaces indicated in the affidavit, and give it to the notary. He or she will have you and your witnesses swear to the truth of the statements in the affidavit. (These are basically the same statements you used when the will itself was being signed and witnessed.) The notary will then date and sign the affidavit and put his or her notary seal on it.
5. Staple the affidavit to your will. If you ever make a new will, you should also redo your affidavit.

**REMINDER:** You and your witnesses must sign the will in addition to signing this affidavit. The affidavit and the will are two separate documents.

## Affidavit

State of Georgia

County of: \_\_\_\_\_

Before me, the undersigned authority, on this day personally appeared \_\_\_\_\_, \_\_\_\_\_ and \_\_\_\_\_, known to me to be the testator and the witnesses, respectively, whose names are subscribed to the annexed or foregoing instrument in their respective capacities, and, all of said individuals being by me duly sworn, \_\_\_\_\_, testator, declared to me and to the witnesses in my presence that said instrument is the last will and testament or a codicil to the last will and testament of the testator and that the testator had willingly made and executed it as a free act and deed for the purposes expressed therein. The witnesses, each on oath, stated to me in the presence and hearing of the testator that the testator had declared to them that the instrument is the testator's last will and testament or a codicil to the testator's last will and testament and that the testator executed the instrument as such and wished each of them to sign it as a witness; and under oath each witness stated further that the witness had signed the same as witness in the presence of the testator and at the testator's request; that the testator was 14 years of age or over and of sound mind; and that each of the witnesses was then at least 14 years of age.

Testator: \_\_\_\_\_

Witness: \_\_\_\_\_

Witness: \_\_\_\_\_

Sworn to and subscribed before me by \_\_\_\_\_, testator, and

sworn to and subscribed before me by \_\_\_\_\_ and

\_\_\_\_\_, witnesses, this \_\_\_\_\_ day of \_\_\_\_\_,

## Affidavit

\_\_\_\_\_.

[NOTARY SEAL]

Signature: \_\_\_\_\_

Official capacity of officer: \_\_\_\_\_

## **INSTRUCTIONS: Letter to Executor**

This document outlines the responsibilities your executor will have when it comes time to deal with your estate. You might want to show it to the person you name as executor as a way of explaining what is involved in the job of executor. Or you might attach it to your will, to be read by your executor later.

This letter is intended to help you and your executor understand the executor's role. It isn't part of your will and has no legal effect.

## **The Executor's Role**

You have been named to serve as executor for Shirley A. Maurice (Social Security number 328-48-4880). If you accept the job, you will be in charge of carrying out the directions in her will.

You don't need special financial or legal knowledge to be a good executor. Common sense, conscientiousness and honesty are the main requirements. If you need help, you will be able to hire lawyers, accountants or other experts and pay them from Shirley A. Maurice's estate. This document describes the duties of an executor. As you read, keep in mind that you can always hire professional help.

### **Must You Serve?**

Being named executor does not obligate you to serve. When it comes time, you can choose whether or not to accept this responsibility. Even if you do agree to serve as executor, you can resign. If you decide not to serve, or if you resign, an alternate named in the will should take over. If no alternate is available, the probate court will appoint someone to step in.

### **An Executor's Duties**

As executor, your duties are likely to include:

- Filing the will in the local probate court.
- Deciding whether or not probate court proceedings are needed.
- Deciding whether at least some assets can be transferred immediately, without formal probate, to the people who inherit them.
- If probate is required, asking the court to appoint you as executor and then shepherding the estate through probate.
- Sending notice of the probate proceeding to the beneficiaries named in the will and, if necessary, to certain close relatives—for example, a surviving spouse and children—who would have been entitled to property had there been no valid will.
- Locating and securing the deceased person's assets and then sensibly managing them during the probate process, which commonly takes about six months to a year, depending on where you live. During this time you may need to manage the deceased person's investments, pay bills and sell items of estate property.

- Handling day-to-day details, such as terminating leases and other outstanding contracts, and notifying banks and government agencies—such as the Social Security Administration, the post office, Medicare and the Department of Veterans Affairs—of the death and the fact that you are winding up the person's affairs.
- Setting up a bank account for the estate and transferring the deceased person's money to it.
- Paying continuing expenses that are necessary to keep estate property secure—for example, mortgage payments, utility bills and homeowner's insurance premiums.
- Paying any debts that the estate is legally required to pay. As part of this process, you must notify creditors of the probate proceeding. State law determines the required method of notice. Creditors then have a certain amount of time—usually about four to six months—to file a claim for payment of any bills or other obligations you haven't voluntarily paid. As executor, you decide whether or not a claim is valid.
- Paying income taxes. You will have to file an income tax return on behalf of the deceased person for the year in which the person died. If the estate receives enough income, you'll also have to file an income tax return on behalf of the estate.
- Paying federal estate taxes, if any. Most estates don't owe these taxes. It depends on how much property the deceased person owned at death and to whom the property was left. In 2015, only estates worth more than \$5.43 million will owe federal estate taxes. In later years, this exemption amount will rise with inflation. In addition, any amount of property left to a surviving spouse who is a U.S. citizen is estate tax free.
- Paying state estate or inheritance taxes, if any. Some states also levy estate or inheritance taxes. But like the federal estate taxes, most estates are not large enough to owe them. For estate taxes, the exemption for most states is lower than the federal exemption. For inheritance taxes (which are technically levied on beneficiaries, rather than the estate) tax rate depends on the relationship of the beneficiary to the person who died. To learn whether your state has an estate or inheritance tax go to

<http://www.nolo.com/legal-encyclopedia/state-estate-taxes.html>. •Supervising the distribution of property, such as cash, personal belongings and real estate, to the people or organizations named in the will.

- Finally, after debts and taxes have been paid and all the property has been distributed to the beneficiaries, requesting the probate court to formally close the estate.

Obviously, the main reason for acting as executor is to honor the deceased person's requests. However, you will also be entitled to payment. State law regulates the exact amount of payment; it may be affected by factors such as the value of the property left by the deceased person and what the probate court decides is reasonable under the circumstances. Commonly, close relatives and close friends opt not to charge the estate for their services, but the choice will be up to you.

### **Working With a Lawyer**

Many people think that probate requires hiring a lawyer. Although this can often be a sensible choice, especially for estates with lots of different types of property, significant tax liabilities or the potential for disputes among inheritors, it is not always necessary. If you are a main beneficiary, the deceased person's estate is simple, and you have access to good do-it-yourself materials, you may decide to handle the paperwork yourself. Many probate courts provide forms and helpful instructions online.

Essentially, handling a probate court proceeding requires shuffling a lot of papers through the court clerk's office. The vast majority of probate cases don't involve disputes that require a decision by a judge. You may even be able to do everything by mail. Doing a good job requires persistence and attention to tedious detail—not necessarily a law degree.

If the estate qualifies as a "small estate" under state law, you may be able to use streamlined probate procedures and handle the paperwork without a lawyer.

Here are two different ways to work with a lawyer:

- Hire a lawyer to act as a "coach." You can do much of the work yourself, but consult the lawyer when legal questions come up. For example, you might want the lawyer to do some research for you or look over documents before you file them. Along these lines, it is also a good idea to work with a CPA rather than try to handle very technical documents such as estate tax returns all on your own.
- Turn the process of probating the estate over to the lawyer. You'll still be responsible for making decisions, but the lawyer will handle all of the paperwork and deal with the probate court. The lawyer will be paid out of the estate. In most states, lawyers either charge a lump sum or charge by the hour—about \$200 to

\$400 is common. In a few states, however, state law authorizes a specific fee. For example, in California and a few other states, the law authorizes the lawyer to take a certain percentage of the gross value of the deceased person's estate unless you make a written agreement specifying something different. You should be able to find a competent lawyer who will agree to a lower fee. In any case, be sure to negotiate the fee in advance.

### **Other Sources of Help**

Probate court clerks often answer basic questions about court procedures, but they staunchly avoid giving legal advice. Some courts, however, have lawyers on staff who look over probate documents; they may point out errors in your papers and tell you how to fix them.

In many law offices, lawyers delegate all the probate paperwork to paralegals. In some areas of the country, experienced paralegals have set up shop to directly help people deal with probate paperwork. These legal document preparers do not offer legal advice; they just prepare documents using the information you give them. They can also file papers with the court for you. Make sure that the person you hire has lots of experience in this field and gives you references to check out.

Other resources for nonlawyers may also be useful:

*The Executor's Guide: Settling a Loved One's Estate or Trust*, by Mary Randolph (Nolo). This book is a thorough guide to an executor's duties. It explains how to wrap up someone's affairs with a minimum of heartache and hassle, from finding and protecting assets to transferring property to beneficiaries with or without formal probate.

*The Trustee's Legal Companion*, by Liza Hanks and Carol Elias Zolla (Nolo). This is a complete guide to serving as a trustee. It explains how trusts work, your duties as a trustee, and how to work with experts.

*How to Probate an Estate in California*, by Julia Nissley (Nolo). This book leads you step by step through the California probate process. It contains tear-out copies of all necessary court forms and instructions for filling them out. Although this book focuses on California law, it offers general information about the probate process and may be useful to executors in any state.

Free legal information from Nolo.com. The Wills, Trusts & Probate section of Nolo.com offers straightforward and easy-to-understand information about the job of an executor, small estate procedures, transferring property without probate, state and federal estate



taxes, how to work with a lawyer and much more. Start your research at <http://www.nolo.com/legal-encyclopedia/the-executors-job>.

### **Names Mentioned in Will**

Here are the names of the people and organizations mentioned in the will of Shirley A. Maurice. This may be useful to you as you administer the estate. If the will maker entered address and phone information, it appears after the name.

#### **Andrea L. Black**

Date of birth: September 11, 1978

Child of Shirley A. Maurice, Beneficiary, Alternate Custodian under UTMA, Alternate Executor

#### **Asher T. Maurice**

Date of birth: October 10, 2008

Grandchild of Shirley A. Maurice, Beneficiary

#### **Avery J. Maurice**

Date of birth: October 10, 2008

Grandchild of Shirley A. Maurice, Beneficiary

#### **David C. Black**

Custodian under UTMA

#### **Desiree K. Maurice**

Custodian under UTMA

#### **Eugene G. Maurice**

Georgia

Spouse of Shirley A. Maurice, Beneficiary

#### **Jordyn D. Black**

Date of birth: December 1, 2010

Grandchild of Shirley A. Maurice, Beneficiary

#### **Michael D. Maurice**

Date of birth: October 17, 1975

Child of Shirley A. Maurice, Beneficiary, Alternate Custodian under UTMA, Executor

**Shirley A. Maurice**

Georgia

Testator

## **INSTRUCTIONS: Letter to Alternate Executor**

This letter is similar to the Letter to Executor, but is written for your alternate executor. It outlines the responsibilities your executor will have when it comes time to deal with your estate. You might want to show it to those you name as alternate executor as a way of explaining what would be involved. Or you might attach the Letter to Executor to your will, to be read by whoever actually becomes your executor.

If you named more than one alternate executor—either as a second alternate or as joint alternates—you can use the program to print out additional copies of this letter for each alternate.

This letter is intended to help you and those you name as alternate executor understand the executor's role. It isn't part of your will and has no legal effect.

## **The Executor's Role**

You have been named to serve as alternate executor for Shirley A. Maurice (Social Security number 328-48-4880). If the person or persons named as executor cannot or will not serve, you will have the choice to serve as executor of Shirley A. Maurice's estate.

If you accept the job, you will be in charge of carrying out the directions in Shirley A. Maurice's will. You don't need special financial or legal knowledge to be a good executor. Common sense, conscientiousness and honesty are the main requirements. If you need help, you will be able to hire lawyers, accountants or other experts and pay them from Shirley A. Maurice's estate. This document describes the duties of an executor. As you read, keep in mind that you can always hire professional help.

### **Must You Serve?**

If the person or persons named to be executor cannot or will not serve, the court will look to you—however this does not obligate you to serve. When and if it comes time, you can choose whether or not to accept this responsibility. Even if you do agree to serve as executor, you can resign. If you decide not to serve, or if you resign, another alternate named in the will should take over. If no alternate is available, the probate court will appoint someone to step in.

### **An Executor's Duties**

As executor, your duties are likely to include:

- Filing the will in the local probate court.
- Deciding whether or not probate court proceedings are needed.
- Deciding whether at least some assets can be transferred immediately, without formal probate, to the people who inherit them.
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- Sending notice of the probate proceeding to the beneficiaries named in the will and, if necessary, to certain close relatives—for example, a surviving spouse and children—who would have been entitled to property had there been no valid will.
- Locating and securing the deceased person's assets and then sensibly managing them during the probate process, which commonly takes about six months to a year,

depending on where you live. During this time you may need to manage the deceased person's investments, pay bills and sell items of estate property.

- Handling day-to-day details, such as terminating leases and other outstanding contracts, and notifying banks and government agencies—such as the Social Security Administration, the post office, Medicare and the Department of Veterans Affairs—of the death and the fact that you are winding up the person's affairs.
- Setting up a bank account for the estate and transferring the deceased person's money to it.
- Paying continuing expenses that are necessary to keep estate property secure—for example, mortgage payments, utility bills and homeowner's insurance premiums.
- Paying any debts that the estate is legally required to pay. As part of this process, you must notify creditors of the probate proceeding. State law determines the required method of notice. Creditors then have a certain amount of time—usually about four to six months—to file a claim for payment of any bills or other obligations you haven't voluntarily paid. As executor, you decide whether or not a claim is valid.
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<http://www.nolo.com/legal-encyclopedia/state-estate-taxes.html>. •Supervising the distribution of property, such as cash, personal belongings and real estate, to the people or organizations named in the will.

- Finally, after debts and taxes have been paid and all the property has been distributed to the beneficiaries, requesting the probate court to formally close the estate.

Obviously, the main reason for acting as executor is to honor the deceased person's requests. However, you will also be entitled to payment. State law regulates the exact amount of payment; it may be affected by factors such as the value of the property left by the deceased person and what the probate court decides is reasonable under the circumstances. Commonly, close relatives and close friends opt not to charge the estate for their services, but the choice will be up to you.

### **Working With a Lawyer**

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### **Other Sources of Help**

Probate court clerks often answer basic questions about court procedures, but they staunchly avoid giving legal advice. Some courts, however, have lawyers on staff who look over probate documents; they may point out errors in your papers and tell you how to fix them.

In many law offices, lawyers delegate all the probate paperwork to paralegals. In some areas of the country, experienced paralegals have set up shop to directly help people deal with probate paperwork. These legal document preparers do not offer legal advice; they just prepare documents using the information you give them. They can also file papers with the court for you. Make sure that the person you hire has lots of experience in this field and gives you references to check out.

Other resources for nonlawyers may also be useful:

*The Executor's Guide: Settling a Loved One's Estate or Trust*, by Mary Randolph (Nolo). This book is a thorough guide to an executor's duties. It explains how to wrap up someone's affairs with a minimum of heartache and hassle, from finding and protecting assets to transferring property to beneficiaries with or without formal probate.

*The Trustee's Legal Companion*, by Liza Hanks and Carol Elias Zolla (Nolo). This is a complete guide to serving as a trustee. It explains how trusts work, your duties as a trustee, and how to work with experts.

*How to Probate an Estate in California*, by Julia Nissley (Nolo). This book leads you step by step through the California probate process. It contains tear-out copies of all necessary court forms and instructions for filling them out. Although this book focuses on California law, it offers general information about the probate process and may be useful

to executors in any state.

Free legal information from Nolo.com. The Wills, Trusts & Probate section of Nolo.com offers straightforward and easy-to-understand information about the job of an executor, small estate procedures, transferring property without probate, state and federal estate taxes, how to work with a lawyer and much more. Start your research at <http://www.nolo.com/legal-encyclopedia/the-executors-job>.

### **Names Mentioned in Will**

Here are the names of the people and organizations mentioned in the will of Shirley A. Maurice. This may be useful to you as you administer the estate. If the will maker entered address and phone information, it appears after the name.

#### **Andrea L. Black**

Date of birth: September 11, 1978

Child of Shirley A. Maurice, Beneficiary, Alternate Custodian under UTMA, Alternate Executor

#### **Asher T. Maurice**

Date of birth: October 10, 2008

Grandchild of Shirley A. Maurice, Beneficiary

#### **Avery J. Maurice**

Date of birth: October 10, 2008

Grandchild of Shirley A. Maurice, Beneficiary

#### **David C. Black**

Custodian under UTMA

#### **Desiree K. Maurice**

Custodian under UTMA

#### **Eugene G. Maurice**

Georgia

Spouse of Shirley A. Maurice, Beneficiary

#### **Jordyn D. Black**

Date of birth: December 1, 2010



Grandchild of Shirley A. Maurice, Beneficiary

**Michael D. Maurice**

Date of birth: October 17, 1975

Child of Shirley A. Maurice, Beneficiary, Alternate Custodian under UTMA, Executor

**Shirley A. Maurice**

Georgia

Testator