

## Checklist for Choosing the Best Personal Representative (Executor)

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- **Someone You Trust Completely**
  - Pick a person who will be honest and follow your wishes.
  - This could be a family member, a close friend, or even a professional like an attorney.
- **Someone Who is Organized and Responsible**
  - They will need to handle paperwork, manage money, and work with lawyers and banks.
  - If they are good at handling their own responsibilities, they can likely handle yours too!
- **Someone Who Can Handle Stress Well**
  - Settling an estate can take months or even years.
  - They need to be patient and able to solve problems without getting overwhelmed.
- **Someone Who Can Be Fair and Unbiased**
  - If there are family disagreements, this person should be able to stay neutral and follow your wishes.
  - They should be good at making fair decisions and keeping the peace.

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### CONTACT US

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- **Someone Who Can Communicate Well**
  - They will need to talk with lawyers, banks, and family members.
  - Being able to explain things clearly and kindly is important.
- **Someone Who Lives Close (If Possible)**
  - If your representative lives far away, handling legal matters and paperwork could be harder.
  - If they are nearby, it may be easier for them to take care of things quickly.
- **Someone Who Understands Your Wishes**
  - Make sure they know and agree to carry out your final wishes.
  - Have a conversation with them so they understand what's most important to you.
- **Someone Who is Willing to Take on the Role**
  - It's a big responsibility, so they should be willing and able to do it.
  - Ask them ahead of time if they are comfortable with the job.
- **A Backup Choice**
  - Life happens! Choose a second person in case your first choice is unable to do the job when the time comes.

## **Final Thoughts**

Choosing a Personal Representative is an important step in planning for the future. This person should be reliable, fair, and willing to take on the job. Take your time, talk to your family, and choose wisely!

If you need help setting up your will or have questions about estate planning, we're here for you!