Holland Law Offices, LLC.

Wills, Trusts, Estates, Probate,
Asset Protection & LGBT Planning

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Large firm experience, small firm responsiveness

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Estate Administration

Knowledge and expertise is required to settle estates in an efficient and cost-effective manner. Often family members or a surviving spouse is appointed as executor but is unfamiliar with the probate process. An experienced attorney can counsel family members and beneficiaries; treating them with respect, objectivity and independence to avoid conflicts that can arise in the settlement of an estate. No matter how complex the estate, as an experienced trust and tax attorney, Paul Holland will work to finalize the settlement efficiently and explore solutions and tax-planning opportunities to benefit the estate and beneficiaries.

Working closely with your accountant and financial adviser, an experienced attorney like Paul Holland can bring specialized resources and services to insure efficient estate settlement in compliance with probate procedures and tax codes. In estate settlement, there are critical filing dates with the probate court and taxing authorities. In addition, post-mortem tax planning can often add value to the process by suggesting techniques that will provide tax benefits to the estate and ultimate beneficiaries.

If you have been appointed executor of an estate, you should be aware of the significant responsibility and unique challenges of this role. As an executor, you will serve as the legally appointed representative who will ensure that the probate process is followed, the taxing authorities are satisfied, and the provisions in a decedent’s Will are carried out. Given these complexities, consider whether you would benefit from hiring an experienced attorney to advise you in your role as executor.

Estate administration services include:

- Meeting with family members and other advisors during the estate settlement process;
- Collecting, inventorying and safeguarding assets;
- Arranging for appraisals of assets;
- Determining the retention or sale of assets and providing ongoing management of retained assets;
- Arranging for the payment of bequests;
- Coordinating the preparation and filing of all required tax forms and returns;
- Identifying claims against the estate and satisfying or disallowing such claims;
- Coordinating the distribution of assets;
- Overseeing the preparation and filing of federal and state estate and income tax returns; and
- Supervising the preparation of all required reports to finalize and close the estate.