

80/20 Estate Planning
Host – Albert E. Gibbons

Tape # 11

Guests:

Dennis R. Urffer, CPA – Resnick, Amsterdam, Leshner, P.C.
Scott S. Small, J.D. – Mellon Private Asset Management

Topic:

Estate Administration

Outline:

What is Estate Administration?

What are the important issues in dealing with the executor?

What are the responsibilities of an executor?

What is fiduciary responsibility?

How does an Executor go about deciding whether they need professional help?

In the end, whose ultimate responsibility is the execution of the will & trust?