

Taking care of your loved one's last wishes

Information for Beneficiaries



Dealing with the loss of a loved one is stressful for families. But having the right help and advice can make all the difference.

The executor of a person's Will is responsible for ensuring that their wishes are carried out as they wanted – the process of estate administration. Their role is to make sure the assets are transferred to beneficiaries as smoothly and efficiently as possible.

with you for
generations
to come



We administer more estates in New Zealand than anyone else, providing a specialist service from start to finish.

Here's how the process works...

1. *Meet with the beneficiaries* to agree a Plan of Administration.
2. *Confirm the assets* of the estate.
3. *Get Court approval* to proceed with administration.
4. *Deal* with assets.
5. *Distribute* the estate.
6. *Account* for everything.

Simple estates

→ 3-6 months

Complex estates

(e.g. those with assets held in trust)

→ More than 6 months

Keeping you informed

Estate administration can be a complex process, but your estate specialist will take care of everything – listening and consulting with you and other beneficiaries.

Our team of estate specialists, lawyers and accountants manage all the legal, tax and administrative tasks, keeping you informed every step of the way.

We're here to help

As executor and trustee, our role is to transfer the estate according to the terms of the Will.

We recognise that this is often an emotional time for families, and we're here to help.

Next steps

Your estate specialist will provide a Plan of Administration which outlines the full process, information about our fees and likely time involved. Our charges are based on the work we do, not on the value of the estate.

Your estate specialist can also provide you with copies of our estate administration fees and information guides.

Talk to us today

Contact your estate specialist by phoning 0800 371 471.

You can also visit us online at www.publictrust.co.nz