



EXECUTOR SERVICES



Equity Trustees

Incorporating



Australian Executor Trustees

1300 133 472
eqt.com.au



CONTROL THE IMPACT ON YOUR FAMILY

Appointing Equity Trustees Equity Trustees (which includes Australian Executor Trustees) as Executor can remove a burden from your family and friends during their time of grief.

WHAT IS AN EXECUTOR?

An Executor is appointed by you in your Will. They manage your estate, after your death, and distribute it according to your wishes.

DUTIES OF AN EXECUTOR?

The Executor may need to apply to the Supreme Court in the state or territory of the testator's (the person who created the Will) usual residence for a "grant of probate". This is recognition that the Will is legally valid and gives the Executor the proper authority to deal with the estate.

Other duties of the Executor may include:

- Organising the funeral
- Assuming custody of your estate
- Paying debts
- Submitting date of death and estate tax returns
- Resolving disputes
- Selling properties
- Distributing the estate in accordance with the Will
- Preserving assets and managing investments until beneficiaries are of age.

WHO SHOULD BE YOUR EXECUTOR?

Often a friend or relative is appointed as Executor without understanding the responsibilities that come with the role. The process can be complex, lengthy and emotionally draining.

Another option is to appoint a trustee company, such as Equity Trustees, to undertake the role of Executor or co-Executor.

A trustee company can expertly, and impartially, co-ordinate all the legal, administrative, investment and tax requirements to ensure your estate is distributed efficiently.

APPOINTING EQUITY TRUSTEES

Equity Trustees can be appointed as Executor or co-Executor of your estate through your Will. We may also be appointed by an Executor who does not wish to take up the appointment or by the next of kin if there is no valid Will.

OUR EXECUTOR SERVICES INCLUDE:



ESTATE ADMINISTRATION AND TRUSTS

Losing a loved one is difficult and administering a deceased estate can be demanding and emotionally draining. In providing estate administration services, we deal with third parties (such as government departments, courts, banks, share registries, insurance companies, lawyers and accountants) and beneficiaries to ensure the estate is administered in line with the wishes of the deceased.



ASSET MANAGEMENT

Strong governance – Equity Trustees is heritage Australian brand and our position as a trustee company requires an extra level of fiduciary duty to ensure client portfolios are prudently managed. More than advice, our highly experienced team are hands on – investing across key asset classes and closely monitoring stocks, investment managers and not-for-profit specialists.



PROPERTY MANAGEMENT

In providing estate administration services, we deal with third parties (such as government departments, courts, banks, share registries, insurance companies, lawyers and accountants) and beneficiaries to ensure the estate is administered in line with the wishes of the deceased.



ESTATE TAXATION

Equity Trustees covers all aspects of the administration process, taking care of both legal and taxation requirements. They are your 'one-stop-shop' with expertise employed directly. We provide the experience to ensure steps occur in the correct order with input and coordination from in-house experts, and in a timely manner to avoid pressure from beneficiaries to finalise the estate.



What will always matter to us – and what has enabled Equity Trustees to stand the test of time – is the quality of the care we show each other. We show care not just in our personal interactions, but in the technical and service support which works behind the scenes to ensure our clients and their assets are secure and services are structured to suit individual needs.



IAN WESTLEY
Executive General
Manager, Trustee and
Wealth Services

ABOUT US

Equity Trustees was established in 1888 for the purpose of providing independent and impartial trustee and executor services to help families throughout Australia protect their wealth. As one of Australia's largest and oldest listed independent trustees, we offer a diverse range of services to individuals, families and corporate clients including asset management, financial advice, estate planning and philanthropic services.

In 2022, Australian Executor Trustees (AET) joined the Equity Trustees group of companies, expanding our network of offices into all major cities, and the capability of our specialist teams. Together we share a deep commitment to our purpose of helping people take care of the future.

Equity Trustees Wealth Services Limited (ABN 33 006 132 332) AFSL 234528 and Australian Executor Trustees Limited (ABN 84 007 869 794) AFSL 240023 are part of the EQT Holdings Limited (ABN 22 607 797 615) group of companies, listed on the Australian Securities Exchange (ASX:EQT).

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