



# Estate and Trust Administration For Dummies

By Margaret Atkins Munro, Kathryn A. Murphy

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**Estate and Trust Administration For Dummies** By Margaret Atkins Munro, Kathryn A. Murphy

**Your plain-English guide to administering an estate and/or trust**

As more and more of the population reach senior ages—including baby boomers, many of whom do not have wills—an increasing number of people are being thrust into the role of executor, administrator, personal representative of an estate, or trustee of a trust after the death of a loved one. This updated edition of *Estate & Trust Administration For Dummies* guides you through the confusing process of administering an estate and/or trust.

Settling an estate and administering a trust can be complicated, messy, and time-consuming for individuals named as executor or trustee, most of whom have no previous experience with such matters. *Estate & Trust Administration For Dummies* shows you how to make sound decisions for your unique circumstances.

- Guides you through the confusing process of administering an estate and/or trust
- Provides expert advice on unfamiliar estate and trust tax law
- Gives you a practical checklist to follow for all of your estate and trust administration questions and concerns

Whether you're looking for guidance on how to navigate the probate process and estate taxes, settle debts and bequests, fund a trust, comply with tax regulations, or anything in between, this hands-on, friendly guide takes away the mystery and provides detailed answers to all of your estate and trust administration questions.

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## **Editorial Review**

From the Back Cover

Learn to:

- Take the proper steps to navigate estate and trust processes
- Comply with tax regulations
- Make sense of unfamiliar estate and trust administration terms

Your plain-English guide to administering an estate or trust

Administering an estate or a trust is a big responsibility. This practical, authoritative guide contains advice for handling estates and trusts, whether large or small. It also explains how to read and interpret documents, take care of a loved one's estate in the event he or she never created a will, and help the estate or trust avoid paying too much (or too little) in taxes.

- Estate and Trust Administration 101 — get the lowdown on estate and trust administration lingo; who the players are; and, in the case of trusts, exactly what games are being played
- From soup to nuts — determine what the decedent owned (and owed), locate the necessary documents, figure out who inherits, shepherd the estate through the probate process, distribute what's left after everyone has been paid, and close the estate for good
- The powers that be — discover what powers you have as trustee, what duties you're expected to perform, how to keep the necessary records, and the best way to terminate the trust after its job is done
- A pain in the tax — find a plain-English explanation of preparing a simple estate tax return (Form 706), annual income tax returns for trusts and estates (Form 1041), and the decedent's final Form 1040

Open the book and find:

- The first steps to take after a loved one's death
- Guidance on navigating the probate process
- Advice on marshaling and liquidating assets
- The duties of trustees and executors
- How to file income tax returns for a decedent, estate, or trust
- Common pitfalls to avoid
- Tips on finding and managing professional help
- Ten common taxes you may have to pay

About the Author

**Margaret Atkins Munro, EA**, is a tax advisor, writer, and lecturer with more than 30 years' experience in trusts, estates, family tax, and small business. Kathryn A. Murphy, Esq., is an attorney with more than 20 years' experience administering estates and trusts and preparing estate and gift tax returns.

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