

Six tips to make things simple for your executors

An executor is legally responsible for carrying out the instructions set out in a will.

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Executors may be family, friends or professionals, but they must make sure everything is done correctly at every stage, from collecting details of all the assets, reporting to HMRC, obtaining probate, to distributing money and other assets to beneficiaries. Agreeing to the role and having the opportunity to discuss your wishes will help them prepare. Partner and Head of Private Client Services at RIAA Barker Gillette (UK), [James McMullan](#), suggests some other simple steps.



Draft a clear, valid will

Ensure your will complies with all legal requirements and reflects your wishes clearly. You should check and discuss anything that could lead to a dispute with those involved. Consider consulting a solicitor to ensure all bases are covered, including provisions for guardianship, specific bequests, and how you want to share your estate. Whatever the cost of having a will drawn up by a professional, it is a small price compared to the costs involved if the validity of a homemade will is questionable.

Store your will securely

Keep your will in a safe but accessible place and inform your executors where it is stored. Options include a solicitor's office, a bank's safe deposit box, or a registered will storage service. You can also log its existence with the [National Wills Register](#). You should avoid storing your will in a place that could be overlooked or difficult to access, such as a personal safe with an unknown combination.

Review and update regularly

Life events such as marriage, divorce, the birth of children, or a significant change in assets can affect the validity or relevance of your will. Regularly reviewing your will ensures it remains aligned with your current wishes.

Consider your digital assets

In today's digital age, estate planning must include online accounts, digital assets, and even social media

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profiles. Leave instructions for accessing important accounts and consider appointing a digital executor if necessary.

Plan for taxes

While the tax-free threshold for inheritance tax (IHT) is £325,000 in the UK, estates exceeding this may be liable for significant tax payments. Proper estate planning can help mitigate IHT liabilities, for instance, by effectively using exemptions, gifts, or trusts.

Communicate with executors and beneficiaries

Discussing your plans with all involved reduces misunderstandings and surprises later. Executors should understand their responsibilities, and beneficiaries should know your intentions to help manage expectations.

Make life easier for your executors and ensure your estate is handled smoothly. With the right planning, you can prevent unnecessary stress, disputes, and tax burdens.

Start your estate planning today with expert guidance from [James McMullan](#).