BAGLEY RHODY

ESTATE AND BUSINESS LAW

Estate & Trust Administration

When you call Bagley & Rhody, you'll be answered by our welcoming receptionist, who will obtain basic information from you and direct you to the estate and trust administration team to begin the intake process.

A member of our team will explain the intake process and attorney consultation policy, obtain additional details and documentation, and schedule your initial consultation with an attorney and a paralegal who will assist you throughout the administration process. You will also receive an estate questionnaire to complete and return before the first meeting, which is used during the remainder of the administration. Our goal is to have as much information as possible prior to the initial consultation to ensure that it is as productive as possible.

In our initial consultation, we will walk through the estate and/or trust administration process, create a list of known assets, discuss the flow and ultimate distribution of assets, and answer any questions you might have. We understand that you are meeting with us immediately following the passing of a loved one or close friend and that legal matters may be the last thing on your mind. We want you to feel comfortable with our team and to understand the steps included in the administration. Our goal is to make the process as easy as possible during this difficult time.

After the initial consultation, or if we have enough information that an initial consultation is not required, you will receive our engagement letter outlining the terms of our legal services. You will also receive a comprehensive summary letter that serves as a road map for the overall administration process along with some initial action items. Throughout the administration process, you will continue to receive status updates and information about the next steps.

Every estate or trust is different, but the administration process typically takes between 9 and 18 months to complete, at a minimum. We understand that the administration process can be burdensome and requires you to balance your own personal obligations. We are here to assist you whether you choose to take a more active role in the process or defer to our team. Regardless, as personal representative and/or trustee, you are the fiduciary and make all final decisions.

We pride ourselves on being team players and not overstepping our areas of practice. We enjoy close working relationships with other professionals and if you have a matter that we are not comfortable handling, we will let you know and refer you to someone we know can best handle your needs.