



# DENVER WEALTH MANAGEMENT, INC. | STANDARD OF CARE **EXECUTOR & TRUSTEE ROLES**

Assigning suitable executors and trustees is crucial. Tackle the following checkpoints to address just that. For assistance, please do not hesitate to reach out to our team—call our office at (303) 261-8015.

## **PAPERWORK**

File Form 706: United States Estate (and Generation-Skipping Transfer) Tax Return.

Four months after filing Form 706, request a closing letter.

Determine whether probate court will be necessary.

## **FINANCES**

Organizing the proper paperwork and accounts can get a bit confusing. Contact our office for some additional support and guidance.

Locate and manage your assets.

Establish an estate [bank] account.

Pay expenses, taxes, debt, and creditors.

Distribute property.

Close the estate.

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 | **Helping successful individuals address their financial future.**

Securities offered through LPL Financial, Member FINRA/SIPC. Investment advice offered through Denver Wealth Management, Inc., a registered investment advisor. Denver Wealth Management, Inc. is a separate entity from LPL Financial.

This information is not intended to be a substitute for individualized tax or legal advice. We suggest that you discuss your specific situation with your tax or legal advisor.