DENVER
WEALTH MANAGEMENT

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.