BAGLEY RHODY

ESTATE AND BUSINESS LAW

Estate & Trust Administration

When you call Bagley & Rhody, you'll be answered by our welcoming receptionist or Client Coordinator, who will begin the client intake process and obtain important information from you.

This initial information will be relayed to our estate and trust administration team. One of our estate and trust administration paralegals will contact you for additional details and documentation, answer any preliminary questions you have, and schedule your initial meeting or phone call with the attorney and paralegal who will assist you throughout the administration process. You will also receive an estate questionnaire to complete and return before the first meeting. Information provided by you in the estate questionnaire is also used throughout the administration process. Our goal is to have as much information as possible prior to the initial meeting to ensure that it is as productive as possible.

In our initial meeting, 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, to understand the administration process, and to make the process as easy as possible during this difficult time.

After the meeting, you will receive our engagement letter outlining the terms of our legal services. You will also receive a comprehensive letter that summarizes our meeting and provides 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 in the process

Every estate or trust is different, but the administration process typically takes between 9 months to a year and a half to complete, at a minimum. Our goal is to be your guide and to make the process easier for you. 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.

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