Wealth & Investment Management

Estate Services

Offered through Wells Fargo Bank, N.A.

Creating and implementing a well-executed plan

Passing along your legacy to the next generation can seem like a daunting task. After all, your estate reflects a lifetime of achievement, hard work, and closely held values. So how can you be confident that your wishes will be carried out in the most efficient and effective way possible when you're gone?

The Wells Fargo Bank Estate Services team is here to help. Acting as your personal representative of your estate or trustee of your trust, our specialists have the experience needed to help ensure that your plan is implemented correctly, disputes are resolved, and assets are distributed in a timely manner.

The right executor or trustee can be key

An estate settlement plan is only as effective as its execution. That's why it requires an executor or trustee who has the knowledge, time, and commitment to settle your estate or trust to your exact specifications.

In most cases, an executor or trustee is required to:

- **Administer and manage** the assets of the estate or trust until they are distributed to the heirs or beneficiaries.
- **Distribute the assets** in an orderly and tax-efficient manner, and in accordance with the will or trust.
- **Handle the administration duties** of the estate, including notifying interested parties and government agencies, preparing legal accounting, and filing documents and taxes.

A professional approach to estate settlement

As one of the leading national providers of estate settlement services, our specialists hold advanced degrees and certifications related to complex estate, tax, and investment planning areas. They will consult with you, your attorney, your accountant, and other outside advisors and provide ongoing support for your beneficiaries.

When you name Wells Fargo Bank as your executor or trustee, we can manage every aspect of the settlement process:

- Review will and trust provisions with your family
- Estate and trust administration
- Consult with your attorney, accountant, and other outside advisors to provide ongoing support for your beneficiaries
- Keep beneficiaries informed via regular communication and periodic account statements
- Assist with court administration process, including preparation of inventories and accountings
- Coordinate tax return preparation and payment of debts and expenses
- Marshal and safeguard assets, and arrange for valuations and appraisals
- Impartially handle and resolve disputes

Ways we can serve you

Our Estate Services team can take the lead in the estate settlement process to help relieve your loved ones of the responsibilities and work involved. We can serve in the following capacities:

- **Executor or personal representative.** Carrying out the wishes of your will.
- **Trustee.** Executing the provisions of your trust.
- **Successor trustee.** Assuming the duties of your trust when the named trustee (you or someone else) is no longer able to.
- **Agent.** Acting on your behalf when you are named as an executor or personal representative of a loved one's estate or trustee of a trust.

Let’s connect

To begin crafting an estate plan that will honor your wishes and provide for your loved ones, contact your advisor.