



actlaw
society

2024 Intensive Conference

BRINGING THE BALANCE

13 – 14 MARCH 2024 | NOVOTEL CANBERRA

The logo for actlaw society, featuring the word "actlaw" in orange and "society" in grey, both in a sans-serif font, set against a dark blue rounded rectangular background.

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A photograph of several smooth, rounded stones of various colors (brown, grey, red) stacked on top of each other, balanced precariously. The background is a soft, light blue sky. The stones are arranged in a way that suggests balance and stability, with a large, light-colored stone at the base and several smaller, darker stones stacked on top.

Overcoming Challenges in Estate Administration

PRESENTED BY ANDREW FREER

Principal, KJB Law



Overcoming Challenges in Estate Administration

ACTLS INTENSIVE CONFERENCE

14 MARCH 2024

Managing Executors

1. Joint and several?
2. Renunciation
3. Reserving Leave
4. Power of Attorney for absent executors.

Clarify the Family Tree

1. Is the death certificate accurate?
2. Specify the relation of the applicant to the deceased
3. Spouse / Partner / Eligible Partner – Domestic Partner (2 years)
4. Family Provision – Partner / Domestic Partner (any time) / Domestic Relationship (2 years)
5. Issue

Consents

Probate: **Named Executors / Renunciation / Reserving of Leave**

Administration: **Partner?**
Adult Child?
Next of Kin?

See section 12, Schedule 6 & 49C of the *Administration and Probate Act 1929*.

Form 3.10 or Affidavit

Evidential Requirements

- Relationship
- Delay
- Domicile
- Searches
- Names & interest of everyone with a beneficial interest
- Documents sufficient to prove relationship with the deceased
- Other documents (Personal Chattels lists / informal codicils)

More Questions?

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