

SAGEVAULT

LEGACY PLANNING SERVICES

Choosing & Asking an Executor

*A guide to picking the right person—and starting
the conversation with clarity and care.*

WHAT MAKES A GOOD EXECUTOR?

Naming someone as your executor is one of the most important decisions you'll make in your estate plan. This person will be responsible for handling everything after you're gone—your accounts, your property, your wishes, and your people.

A good executor isn't just someone you love.

It's someone who has the skills, time, and emotional capacity to manage the details and the dynamics.

Traits of a Strong Executor:

- **Capacity** – They're organized, dependable, and mentally/emotionally capable of handling complex tasks.
- **Stamina** – Estate settlement takes months (or more). Choose someone with follow-through.
- **Communication Skills** – They'll be the point person for family, institutions, and professionals. They'll need to manage updates, expectations, and sometimes conflict.

Listen to your instincts.

This is not about who's oldest, closest, or "expects" it. It's about capability. Choose the person best equipped to carry out your wishes.

HOW TO ASK SOMEONE TO BE YOUR EXECUTOR

Once you've identified the right person, **don't just write their name into your will without talking to them first.** The role is an honor—but also a major responsibility.

Use this script to open the conversation:

I've been getting my will and planning documents in order, and I wanted to talk to you because I'm thinking about naming you as my executor.

It's a big responsibility. You'd be the one to handle everything if something happened to me—finances, legal paperwork, and making sure things are done the way I want.

I'm not asking for a yes right away. I just want you to know what it really involves and make sure you feel comfortable with it.

If it helps, I can send over a simple overview of what the job usually includes. That way you can ask questions or even say no without pressure.

Follow-Up Text or Email

Thanks again for chatting with me about the executor role. I know it's not the easiest topic, and I really appreciate your thoughtfulness. There's no pressure either way—what matters most to me is that you feel informed and comfortable if you say yes. I'm including a quick overview of the responsibilities in case that helps you decide.

FREQUENTLY ASKED QUESTIONS

1 **Can executors get paid?**

Yes. Executors can be compensated a fair and reasonable amount from the estate. This is considered a standard estate expense—especially when the role involves complex financials, family coordination, or months of work.

But you're not required to offer payment. It's entirely up to you, and you can include compensation instructions (or not) in your will.

2 **Can I name more than one executor?**

Yes. You can name co-executors if you'd like two people to share the responsibility. Just know that unless otherwise specified, they'll be expected to make decisions together.

Some people give co-executors independent authority, meaning either can act on behalf of the estate without the other's sign-off. Others require joint decisions. Be thoughtful—sometimes one clear lead is simpler.

3 **What if my executor can't or won't serve when the time comes?**

That's why it's smart to name a backup. You can (and should) include at least one alternate executor in your will—someone who can step in if your first choice declines or is unavailable.

This ensures the process doesn't get delayed or kicked to the courts.



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