

# The Role of an Executor

## How much do you know?



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Vice President, Trust Services, BMO Trust Company

Shawna Albornoz is the Vice President of Personal Trusts, working closely with BMO Nesbitt Burns. Shawna has been in the Estate and Trust Industry since 2001 and she has administered over 120 Estate, Trust, Power of Attorney and charitable foundation accounts during her career. Through her experience as a corporate Executor and Trustee for high net worth clients she has acquired the expertise to help families effectively plan for the transfer of wealth to the next generation and deal with all fiduciary responsibilities. Shawna holds her MTI designation from the Canadian Securities Institute, she is a member of The Society of Estate and Trust Practitioners (STEP), an international professional organization dedicated to promoting financial and estate planning considerations between generations, and is a member of the Calgary Estate Planning Council (EPC).



Have you been named as an Executor? Have you asked a loved one to be your Executor? How much do you know about the responsibilities of this role? Join us to learn about the responsibilities of being an Executor, what to expect in the estate administration process, and what you should consider when planning your estate to make the process easier for all involved.

What we will cover:

- Roles and responsibilities of an Executor
- Summary of the estate administration process and complexities
- Planning considerations to make the process easier for your Executor, your estate, and your beneficiaries.
- How do you select someone to be your Executor? Should it be a family member? Who should not be considered?
- Executor compensation – what to expect, and why this is important to address
- What should I do right now to make my Executor's job easier?

**Date:** Thursday November 14th, 2019

**Time:** Cocktail Reception with light fare @ 5:30pm  
Presentation @ 6:00pm

**Location:** cSPACE King Edward  
1721 29th Ave. SW  
T2T 6T7

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If you have named an Executor in your Will or you have been named as Executor for someone else we strongly encourage you to attend and bring your executor(s) to this presentation so you have an understanding of the requirements and responsibilities of being an executor. Please let us know if they will be joining you.

