

THE CARTER CENTER



The Carter Center Presents: *Ask An Executor*

With Guests: Joseph & Teresa Coleman

Hosted By: Barry Nickelsberg, CAP, Chief Development Officer for Estate & Gift Planning
&
Mark N. Williams, Esq., CAP, Senior Associate Director

Thank You

Our work together continues to improve the lives of millions of people, and we cannot thank you enough for your ongoing support.

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Thank You for Your Trust

We would also like to express our gratitude for allowing us to serve as your resource; it is a privilege to be trusted to provide you with information about these important topics.



DISCLAIMER

The information contained in this presentation and these materials are for educational purposes only, and should not be considered financial or legal advice. Any information covered should be discussed with your own estate planning attorney to determine its suitability for your specific situation. The Carter Center is not involved in the practice of law and does not provide legal advice. Mark Williams is an attorney, but he is not your attorney and is not providing you with legal advice; no relationship (attorney/client or otherwise) is created by this educational webinar. By viewing this webinar, you agree to the above.



Teresa Coleman

- Career in pharmaceutical development
- Enthusiastic cook and believer in Julia Child's philosophy, "I Love to Eat"
- Animal lover extreme (current menagerie: 4 horses, 3 cats, an African Grey parrot, a canary, 5 chickens and 3 foster baby kittens)



Joseph Coleman

- Career in corporate finance
- Skier, golfer, motorcyclist, equestrian and philatelist (stamp collector)
- Believer in “Every Day Matters”



Ask An Executor

- How and when did you find out you were going to be an Executor?
- Did you have an opportunity to talk with the person who chose you as Executor before finding out you were chosen?
- How did their wishes inform or guide your actions as Executor?



Ask An Executor

- What was your initial reaction when you learned you would be an Executor?



Ask An Executor

- How would you describe the probate process and your role in it?



Ask An Executor

- What kinds of documents and/or things did you need to do the job?



Ask An Executor

- Can you tell us about your responsibilities?
- What were you allowed to do/not do under the will?
- Did the probate court require you to do or not do certain things?



Ask An Executor

- What was the biggest surprise for you?



Ask An Executor

- Did you encounter any disagreements?
 - If so, how did you resolve them?



Ask An Executor

- What advice do you have for people who are preparing their will and choosing an Executor?



Ask An Executor

- What advice do you have for people who are going to be an Executor?



Ask An Executor

- **Will vs. Trust:** Which did you encounter, and do you have any advice about how people might think about or use each of these?
- If you would like more information on Wills and Trusts, and how they can be used, please click below:
 - Wills Webinar (<https://youtu.be/9dEpj1gLWlQ>)
 - Trusts Webinar (<https://youtu.be/vMQrRlwVkJKU>)



Thank You!
Questions?



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BARRY NICKELSBURG, CAP
Chief Development Officer

ESTATE & GIFT PLANNING

453 Freedom Parkway
Atlanta, GA 30307 USA
Tel (404) 420-3868
Fax (404) 420-3453
barry.nickelsberg@cartercenter.org
www.cartercenter.org

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MARK WILLIAMS, ESQ., CAP
Associate Director

ESTATE & GIFT PLANNING

453 Freedom Parkway
Atlanta, GA 30307 USA
Tel (404) 420-3883
Fax (404) 420-3453
mark.williams@cartercenter.org
www.cartercenter.org

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