Family Meeting Agenda

A structured 45–60 minute meeting for the executor to run with the family after a death

F-08 · FAMILY

"A family meeting is cheaper before the dispute exists."

PREPARED FOR

Sarah Pemberton-Walsh

Executor of the estate of David James Pemberton (died 12 June 2026) · a meeting with the family · Hertford

Meeting date: 27 September 2026 · Location: Margaret's house, Hertford

Why this meeting exists 1

Sarah — you are the executor. The estate falls roughly in the **£500,000–£1 million** range, Margaret survives, and the residuary beneficiaries will want to hear from you directly. Before the institutional work begins in earnest, one calm meeting does more to prevent later conflict than any document.

Most estate disputes are not about money. They are about a family member feeling excluded, surprised, or kept in the dark. The single most effective preventative is the one most executors skip: a short, structured family meeting at the start, where everyone hears the same thing at the same time, in the same room, before any decision has been made. This composition is the agenda for that meeting — what to settle, what to bring, how to handle the sensitive parts calmly, and what to do afterwards.

This is a meeting to align, not to decide everything.

You are not asking the family to approve your decisions — as executor, the discretion is legally yours. You are giving them visibility, hearing their concerns once, and recording what was said. Sixty minutes now saves months of suspicion later. Hold it before you notify the bank or apply for probate.

A practical guide, not legal advice.

This agenda is a practical tool created and reviewed by Valoren. It does not replace a solicitor. Where a decision turns on the will, on tax, or on a disputed entitlement, take advice from a STEP-qualified solicitor before the meeting — and say so in the room.

CONTENTS

Who is in the room, and who is not

2

Get the invitation list right before anything else. The wrong list — too wide, too narrow, or a name added as an afterthought — is itself a source of conflict.

Invite everyone with a direct interest: the surviving spouse (Margaret), every residuary beneficiary, and any co-executor. **For this meeting, that means:** Tom and Alice. **Consider inviting** a named guardian, a person holding a specific bequest that affects the household, or a close relative everyone trusts to keep the temperature down. **Do not invite** in-laws, advisers, or extended family who have no entitlement — their presence changes the register of the room and can make a beneficiary feel outnumbered.

Before you send invitations, confirm the final list — everyone with a direct interest in the estate, plus any co-executor.

THE ONE PERSON WHO MUST NOT BE SURPRISED

If there is a beneficiary you expect to be difficult — or one who has already started asking pointed questions — they must be in the room, and they must hear the plan from you directly, not second-hand. A beneficiary who learns the arrangements from someone else is the single most common origin of a contested estate. Phone them personally before the meeting; do not rely on a group message.

What to bring to the meeting

3

Bring documents, not from memory. Having the papers physically present settles most questions before they become arguments. Tick each as you pack.

EXECUTOR'S MEETING FOLDER · SARAH TO BRING

- [ ] The will (the original if you have it, or the best copy) and any separate **letter of wishes**.
- [ ] A one-page list of the main assets and their rough values — house, accounts, pensions, the car. Estimates are fine at this stage.
- [ ] A certified copy of the **death certificate** (you will reference it; do not pass round the original).
- [ ] The solicitor's name and contact details if one is instructed, so the family can see who is advising.
- [ ] This agenda, printed, one copy each — so everyone can see the shape of the hour.
- [ ] A notebook to record decisions and follow-ups. One person writes; that person is you.
- [ ] Tissues, water, and an unhurried two hours blocked out even though the agenda runs to one.

Set the practical frame in the invitation.

When you invite the family, say plainly: "*This is a short meeting so we all know what happens next with David's estate. It is not a reading of the will and nothing is being decided about anyone's share today.*" Naming what the meeting is *not* lowers the anxiety people arrive with.

I

THE AGENDA ITSELF

A 60-minute structure

Seven movements, timed. The clock is a courtesy — it tells everyone the meeting will end, which makes people calmer about starting.

The 60-minute agenda 4

Run it in order. Each block has a purpose and a time. If a block over-runs, note the open question, park it, and move on — the parked items become the follow-up list in §7.

0–5 MIN

Open — why we are here

Sarah sets the frame in two sentences: this is to keep everyone informed about David's estate; nothing about anyone's share is being decided today. Acknowledge the grief in the room first. Then the agenda.

5–15 MIN

The role — what an executor actually does

Explain, plainly, that the executor collects the assets, pays the debts and tax, and distributes what remains according to the will. The role is finite — most estates take **9–18 months**. You are not the decision-maker over who gets what; the will is. This removes the most common misunderstanding before it can take root.

15–25 MIN

The estate in outline — what there is

Walk through the one-page asset list. The house in Hertford, the bank and savings accounts, the pension, the car. Rough figures only — the estate falls roughly in the **£500,000–£1 million** range. Be clear what is *not* yet known (date-of-death valuations, the final tax position). Honesty about the unknowns builds more trust than false precision.

25–35 MIN

What the will says — in plain terms

Summarise the structure of the gifts without reading the document line by line: Margaret's interest, the residuary split, any specific bequests, any expressed funeral wishes. If a clause is open to interpretation, say so and say the solicitor will confirm it. Do not improvise legal meaning in the room.

35–45 MIN

The sensitive items — handled once, calmly

The house, the personal possessions, the question of who keeps what of David's. These are where conflict lives. Name them deliberately rather than letting them surface as undercurrents. The protocol for handling them is §6.

45–55 MIN

Open floor — questions and concerns

Hand the room over. Most people have one practical question they have been carrying. Let it be asked. Write each one down. You do not have to answer everything on the spot — "I'll find out and come back to you by Friday" is a complete answer.

55–60 MIN

Close — what happens next and when

Read back the follow-ups and who owns each. Confirm how you will keep everyone updated (a short written note at month three, and again when probate is granted). Agree the next point of contact. End by thanking them — and, where it fits, share a meal or a photograph of David. The meeting should close on connection, not on paperwork.

If the meeting cannot happen in person.

A video call works for the same agenda, with two adjustments: send the one-page asset list in advance so no one is reading and listening at once, and keep the group small enough that everyone can speak. For a beneficiary who will not join at all, send them the same written summary you give the room, on the same day, so no one receives information later than anyone else.

II

DECISIONS TO SETTLE

The four that matter

Not every decision belongs in a family meeting. These four do — settling them in the room, with everyone present, is what prevents the slow-burn disputes that surface months later.

Decisions to settle in the room

Each decision below is one the family will feel the consequences of. Raising them openly — even if the answer is "we will decide this properly later" — is far safer than letting them be assumed.

1

D-01 · COMMUNICATION CADENCE

How, and how often, the executor will keep the family informed

Agree it explicitly. A written update at month three, again when probate is granted, and a final account at distribution is a reasonable rhythm that most beneficiaries accept. That first update falls around 12 December 2026. Beneficiaries are entitled to information, not to running commentary on every decision — say this kindly but clearly. The cadence, agreed openly, removes the anxiety that drives most "why haven't I heard anything" conflict.

DECIDE	OWNER	RECORD AS
In the meeting	Sarah (executor)	Agreed update plan

2

D-02 · THE FAMILY HOME

What happens to the house — kept, sold, or transferred

The family home is both the largest asset and the most emotionally charged. Margaret may have a right to remain, or the will may direct a sale, or the residuary beneficiaries may have differing wishes. You do not have to resolve it today — but you must name it, hear everyone's view once, and explain that the will and any tax position determine what is actually possible. Settling the *process* for deciding (valuation first, solicitor's view, then a family conversation) is the win, not the outcome.

DECIDE	VERIFY WITH	RECORD AS
Process now, outcome later	**Solicitor + RICS valuation**	**Agreed sequence**

3

D-03 · PERSONAL POSSESSIONS

How David's belongings will be shared — and by what fair method

Items of little financial value cause the most family rupture, because they carry the memory. Agree a method before anyone takes anything. A common fair approach: each person privately lists the few items that matter to them; clashes are resolved by turns or by lot; sentimental items not in the will are gifted by agreement, recorded in writing. Photograph the contents before dispersal. Nothing leaves the house informally before the method is agreed — say this gently but firmly in the room.

DECIDE	OWNER	RECORD AS
Method, in the meeting	**All present**	**Agreed sharing rule**

4

D-04 · COSTS AND TIMING

What the administration will cost the estate, and roughly how long

Be open about it. A non-complex estate typically costs between **£1,400** and **£4,400** in fees — solicitor or accountant on tax, a RICS valuation if the property approaches the inheritance-tax threshold, statutory creditor notices, and the probate court fee. These come out of the estate, not from anyone's pocket. Set expectations on time too: **9–18 months** is normal, and "nothing has happened yet" for the first **two months** is also normal. By law the executor's year ends twelve months after the date of death, which for this estate is 12 June 2027 — after that point beneficiaries may press for distribution, and interest on legacies can begin to run. *(legislation.gov.uk — Administration of Estates Act 1925 s.44, checked 8 September 2026)* Stated up front, neither surprises anyone later.

DISCLOSE	TIMELINE	RECORD AS
£1,400–£4,400 est.	**9–18 months typical**	**Shared expectation**

Sensitive topics, handled calmly 6

The difference between a meeting that settles a family and one that fractures it is almost entirely in how the hard moments are handled. None of this is about winning the room. It is about lowering the temperature so people can think.

Three sentences that keep the room calm

When someone is upset: "*That's a completely fair thing to feel — let's make sure it's written down so it isn't lost.*" Naming a feeling as legitimate, and capturing it, defuses most of its heat.

When you don't know: "*I don't know the answer to that yet, and I'd rather find out properly than guess. I'll come back to you by Friday.*" Certainty you don't have is the thing that later unravels.

When two people disagree: "*Both of those are reasonable. Let's note both, get the solicitor's view, and decide once we have it — not now, while it's raw.*"

The boundary to hold

You owe the family information, honesty, and a fair process. You do not owe them a renegotiation of the will, a justification for every decision, or a decision made under pressure in the room. If a conversation turns into a demand to change who gets what, say warmly that the will determines the shares and that you cannot and will not vary them informally — and move the meeting on. Holding this line gently is kinder than appearing to agree to something you cannot deliver.

> *"The estate is mine to administer, but it is ours to grieve. I will keep you informed, I will be fair, and I will tell you when I don't yet know. That is the whole of my promise."*
>
> A LINE WORTH SAYING OUT LOUD, IN YOUR OWN WORDS, BEFORE YOU CLOSE

WHEN TO STOP THE MEETING

If the room becomes hostile, if a beneficiary threatens a claim, or if a co-executor refuses to cooperate, do not try to resolve it on the spot. Close the meeting courteously, record what happened, and take advice before reconvening. A short call to a probate solicitor at this point is far cheaper than a contested estate later. Mediation through a STEP-registered specialist typically resolves disputes in one to three sessions — propose it early if you sense a serious rift forming.

After the meeting — the follow-up sequence 7

The meeting is only worth holding if what was agreed is recorded and acted on. Work through these in order within the week, while the conversation is fresh.

i

Write up the meeting note the same day

A one-page record: who attended, what was agreed, what was parked, and who owns each follow-up. Date it. This is your evidence that the family was informed and consulted — quietly the most protective document in the whole administration.

ii

Send the note to everyone — including anyone who could not attend

Same note, same day, to every person with an interest. Nobody learns anything later than anyone else. Invite corrections within a week; this turns the note into an agreed record rather than your version of events.

iii

Action the parked questions and report back by the date you promised

Each "I'll find out and come back to you" is a commitment. Keep a list, work through it, and reply even where the answer is "still waiting on the bank". Reliability on small promises is what earns trust for the big ones.

iv

Confirm the next milestone and the next update

Tell the family the next thing that will happen (valuations gathered, probate applied for) and when they will next hear from you. A standing rhythm of contact, even with little news, is what prevents the silence that breeds suspicion.

File the meeting note with the estate records.

Keep it with the will, the asset list, and the correspondence. If a question is ever raised about whether the family was consulted, this single page answers it. Keep the estate records safe after the estate is wound up — this note belongs in that file.

Key contacts for the meeting 8

Have these to hand in the room. When a question lands that needs a professional answer, you can name exactly who will answer it and by when.

ESTATE OF DAVID JAMES PEMBERTON · REF EFH-VAL2-20260924	
EXECUTOR	Sarah Pemberton-Walsh — executor · primary point of contact for the family
SOLICITOR	Name and confirm one before the meeting if none is instructed yet.
SURVIVING SPOUSE	Margaret Pemberton-Walsh — interest in the family home to be confirmed by the solicitor
BENEFICIARIES	The residuary beneficiaries attending the meeting — see the attendee list above
PROPERTY VALUATION	RICS surveyor — to be appointed if the estate approaches the inheritance-tax threshold
IF A DISPUTE FORMS	STEP Contentious Trusts & Estates mediator — propose early, before positions harden

Where this sits in the wider administration

This meeting is the human front-end of the executor's work. The institutional sequence — registration, notifications, valuations, tax, probate, distribution — runs alongside it, set out in the rest of the Executor's First Hour pack.

WEEK 1–2

Hold the family meeting · will located · estate notebook open

This agenda runs here, early, before the bank is notified. The family is aligned before any irreversible institutional step is taken.

WEEK 2–4

Notifications · direct-debit discipline · first valuations requested

The practical work the meeting set expectations for begins. The agreed communication cadence (D-01) starts here.

WEEK 4–10

Asset inventory · inheritance-tax route confirmed · house valuation

The questions parked at the meeting (the home, the costs) get their real answers here. Report them back as promised.

WEEK 10–18

Probate applied for · grant received · second family update due

The milestone you promised the family at the meeting. A short written update on the grant keeps the trust intact.

MONTH 9–18

Distribution · estate accounts · personal possessions shared by the agreed method

The sharing rule (D-03) is applied. Final accounts go to the residuary beneficiaries. The administration — and the executor's role — concludes.

The other compositions in this pack carry the detail.

The Executor's Companion sets out the twelve matters and the month-by-month timeline. The Tell Us Once Companion handles the notifications. The Form Walkthroughs Reference covers IHT400, PA1P, and IHT402 field by field. This agenda is the piece that keeps the family with you while you do that work.

POWERED BY VALOREN

Prepared 24 September 2026 from customer-maintained records. A composition within the Executor's First Hour pack. Created and reviewed — a practical guide, not legal advice; it does not replace a solicitor.

Statutory and market figures are each checked against their own source and dated beside the figure; the oldest check among those printed is 8 September 2026.

Source instruments: E-03 · R-04 · P-07 · P-14.

Standard Index Group — in formation · England & Wales · Reference EFH-VAL2-20260924 · ES-2026