

YEAR'S BEST PERFORMANCE

ExecuCare Executor Assistance Services

“ExecuCare is all about people,” says Maggie Clarke. “Many people who have been appointed executors of estates may not realize what their legal responsibilities to the estate are or the commitment of time and patience needed to deal with the long lists of tasks and forms that have to be completed.”

Those were realities that Clarke discovered for herself several years back when she was first asked to assist an executor. “I started to get quite a few requests to assist financial planners who were appointed executor and I became rather specialized in this field,” she says. “Two years ago, I decided to go on my own in order to help people who had been appointed executors. I did a lot of research and wrote Execu-Assist, an estate preparation planning workbook for Manitobans.”

And thus was born ExecuCare Executor Assistance Services, the only service of its kind in the province and possibly all of Canada.

“My business is all based on relationships,” Clarke says. “Advertising and marketing do not work. I have found that there is a great need for my services.”

Clarke learned early on that she needed to do more for clients than simply train them to be potential executors. So Clarke enlisted the help of Eddie Calisto-Tavares, president of Options for Success.

Calisto-Tavares has helped Clarke grow her business by assisting her to identify her strengths and core drivers and by giving her the motivation to stay focused on her journey as a business owner. Clarke notes that Calisto-Tavares’ firm provided the guidance, encouragement and critical feedback that she needed to expand her business.

Her first client died suddenly and his surviving spouse had no idea what to do or who to call. The husband had looked after all their affairs.

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In order to meet this client’s need Clarke expanded her service to include estate planning and senior relocation. “I make sure my clients have wills, power of attorney and healthcare directives, and that these documents are kept up to date,” she says. “I also review their finances with them, making sure everything is up to date.”

Clarke also looks after sending notifications of death to government and corporate organizations, compiling and filing insurance claims and government forms, cancelling utilities, services and credit cards, arranging for estate bank accounts, paying bills and inventorying personal assets.

Record management is of the utmost importance in estate planning, Clarke notes. “People take so many documents for



Maggie Clarke (at left, with Sigurdson Financial GM, Pam Kaspick) notes that ExecuCare Executor Assistance Services is the only service of its kind in Manitoba and perhaps all of Canada.

granted. Many people don’t realize, for example, that they can transfer airmiles or aeroplanes to beneficiaries, or donate them to charities for a tax credit.”

One item that shouldn’t have to be passed on to beneficiaries, she points out, is the cost of administering an estate for lack of a will. There are people who are reluctant to pay the cost of making up a will, she says. But this is minor compared to saddling surviving family members with the costs.

She notes that there are currently 85,000 Winnipeggers over the age of 65, almost half of whom have no living relatives. The latter group could will their estates to church groups or charities such as the Winnipeg Foundation, she suggests.

Clarke works closely with a large number of charities and foundations. She also maintains working alliances with legal and accounting firms, real estate agents and financial planners.

One of these is Olschewski & Feuer, a Winnipeg-based law firm specializing in wills/estates, real estate, family law, corporate/commercial law and civil litigation. Relationships like these, according to Clarke, are invaluable, allowing her to focus on the needs of her clients, ensuring that her clients are well-cared for and attended to during the process, and enabling her clients to have access to the expertise of professionals as required.

Clarke is in great demand as a speaker. She explains estate planning, and the responsibilities of executors to seniors groups, such as Age and Opportunity, various church groups, seniors residences and professional associations in Winnipeg and southern Manitoba.

At the end of the day, Clarke observes, her reward for her efforts is knowing that she leaves seniors and their families—who can be scattered all over the world—with peace of mind knowing that someone competent is taking care of their needs.