

# HEIRLOOM

CONSULTANTS

## LEGACY PLANNING

### ORGANIZING & PREPARING ESTATE WHILE YOU'RE ALIVE AND WELL

REVIEW ESTATE PLANNING DOCUMENTS

PREPARE, ORGANIZE AND DOCUMENT ESTATE  
ASSETS

PREPARE, ORGANIZE AND DOCUMENT TANGIBLE  
PERSONAL PROPERTY

RESEARCH MISSING ASSETS

WORK WITH & MAINTAIN RELATIONSHIPS WITH  
CPA, ATTORNEY, WEALTH MANAGEMENT TEAM,  
HEIRS, FAMILY

TRACK ASSETS, QUARTERLY ACCOUNTINGS

QUARTERLY MEETINGS

IDENTIFY FUNERAL PLANS

IDENTIFY PLANS FOR PETS

PREPARE ESTATE FOR ESTATE ADMINISTRATION

ELDER ABUSE/SCAM EDUCATION

HANDLE RED TAPE THAT CAN BE  
OVERWHELMING

PLAN FOR FUTURE ESTATE CLEAN OUT, SALES,  
AND REAL ESTATE SALES

UNDERSTANDING CLIENTS INTENT FOR ESTATE



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## INTEGRESTATE

### MANAGING AND MAINTAINING REAL ESTATE

SECURING PHYSICAL ESTATE AND  
VALUABLES

INITIAL INSPECTION - LIST OF  
SUGGESTED REPAIRS OR UPDATES

REHOME PETS

LIST AND SELL REAL ESTATE

APPRAISALS

ESTATE PHOTOS

VIRTUAL TOUR, 3-D VIRTUAL TOURS

STAGING

REVIEW AND ASSIST WITH TITLE  
ISSUES

SOURCE AND SECURE VETTED

THIRD-PARTY VENDORS

COLLECTIBLE APPRAISALS

ESTATE SALES, AUCTIONS,

DONATIONS

FULL CLEAN OUT/JUNK HAULING

CARPET CLEANING

PLUMBING

HVAC

ELECTRIC

EXTERMINATOR

LAWN MAINTENANCE/SNOW

PLOWING

LANDSCAPING

PODS, DUMPSTERS

STORAGE COMPANIES





# HEIRLOOM

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## HEIRLOOM TRUSTEE CONSULTING

EVERYTHING A TRUSTEE NEEDS TO HANDLE  
OUTSIDE OF REAL ESTATE

SECURING PHYSICAL ESTATE AND  
VALUABLES

INITIAL INSPECTION - LIST OF SUGGESTED  
REPAIRS OR UPDATES

REHOME PETS

**LIST AND SELL REAL ESTATE**

APPRAISALS

ESTATE PHOTOS

VIRTUAL TOUR, 3-D VIRTUAL TOURS

STAGING

REVIEW AND ASSIST WITH TITLE ISSUES

**SOURCE AND SECURE VETTED THIRD-  
PARTY VENDORS**

COLLECTIBLE APPRAISALS

ESTATE SALES, AUCTIONS, DONATIONS

FULL CLEAN OUT/JUNK HAULING

CARPET CLEANING

PLUMBING

HVAC

ELECTRIC

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LAWN MAINTENANCE/SNOW PLOWING

LANDSCAPING

PODS, DUMPSTERS

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