

# YES, WE DO THIS...AND MORE



## LEGACY PLANNING

GO THROUGH DOCUMENTS

PREPARE, ORGANIZE AND DOCUMENT ESTATE ASSETS

PREPARE, ORGANIZE AND DOCUMENT TANGIBLE PERSONAL PROPERTY

RESEARCH MISSING ASSETS

PREPARE ESTATE FOR ESTATE ADMINISTRATION

TRACK ASSETS, QUARTERLY ACCOUNTINGS

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

QUARTERLY MEETINGS

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

## INTEGRESTATE

CLEAN OUT PERISHABLES IN HOUSE

CHANGE DOOR LOCKS

LAWN MAINTENANCE

LANDSCAPING

ASSIST CLIENT TO REMOVE VALUABLES

GENERAL CLEANING

OVERSEE FULL CLEAN OUT/JUNK HAULING

CARPET CLEANING

INITIAL INSPECTION - LIST OF SUGGESTED REPAIRS OR UPDATES

INSPECTIONS (WEEKLY OR BI-WEEKLY)

PLUMBING

HVAC

HOME APPRAISAL

APPRAISALS - COLLECTIBLES

REHOME PETS

DONATE OR REHOME PLANTS

ELECTRIC  
OVERSEE ESTATE SALES  
DONATION SERVICES  
REPAIRS  
PAINT  
PHOTOS OF HOUSE  
VIRTUAL TOUR  
STAGING  
EXTERMINATOR  
ARRANGE FOR TRASH BINS  
ARRANGE FOR PODS  
ARRANGE FOR DUMPSTERS  
ASSIST WITH STORAGE COMPANIES  
LIST AND SELL HOUSE  
ASSIST WITH TITLE RELATED TASKS

## **HEIRLOOM**

INITIAL CONSULTATION  
REGULAR MEETINGS WITH CLIENT  
DIG THROUGH FILE CABINETS OR BOXES OF DOCUMENTS  
REVIEW ESTATE DOCUMENTS, DEEDS  
PROVIDE CUSTOM CHECKLIST OF TASKS  
REVIEW & ORGANIZE DOCUMENTS  
COMPILE LIST OF ASSETS  
OBTAIN TRUST TAX ID (IRS)  
PREPARE W-9 FOR TRUST (IRS)  
ONLINE ASSISTANCE WITH FORMS FOR FAMILY  
CLOSE/UPDATE NAMES ON ACCOUNTS  
CANCEL MEMBERSHIP/SUBSCRIPTIONS  
DOCUMENTATION COORDINATION  
DEATH CERTIFICATE DISTRIBUTION  
DEATH CERTIFICATE GUIDANCE TO CREDITORS  
ASSIST WITH UPDATING EMERGENCY CONTACTS  
ASSIST WITH UPDATING BENEFICIARIES

FORWARD/HOLD MAIL  
UPDATE OWNER OR SHUT OFF UTILITIES  
ASSIST WITH SOCIAL SECURITY NOTIFICATION & BENEFITS  
ASSIST WITH INSURANCE ASSIGNMENT (FUNERAL)  
CANCEL LIFE, HEALTH, PROPERTY & BUSINESS INSURANCE  
CONTACT HUMAN RESOURCES TO REVIEW BENEFITS  
COORDINATE WITH EMPLOYER REGARDING BENEFITS  
ASSIST WITH BUSINESS DISSOLUTION  
ASSIST WITH BUSINESS APPRAISALS  
ASSIST WITH SELLING CAR(S)  
RESEARCH  
COORDINATE & COMMUNICATE W/3RD PARTY VENDORS  
ASSISTANCE WITH VETERAN'S ADMINISTRATION  
RESEARCH COST OF ITEMS NEEDED  
DIRECT CONTACT & REPRESENTATION FOR FAMILY FOR ALL SERVICES  
MEDICAL BILL REVIEW-EXPLANATION OF BENEFITS  
DOCUSIGN SERVICES  
NOTARY SERVICES  
ATTEND LEGAL HEARING  
TRUST ACCOUNTINGS  
ASSIST WITH 706 TAX RETURNS  
MEETINGS WITH CPA OR FINANCIAL ADVISOR  
RETIREMENT ACCOUNT SEARCHES  
REAL PROP, LIABILITY, EMPLOYMENT SEARCHES  
UNCLAIMED PROPERTY ALL STATES SEARCHES  
LIFE INSURANCE SEARCHES  
BANK ACCOUNT SEARCHES - TOP 10 BANKS  
BANK ACCOUNT SEARCHES - PRIVATE WEALTH FIRMS  
BANK ACCOUNT SEARCHES - SEARCH BY REGION

**ACT AS ACCOUNTABILITY PARTNER/COACH**  
**ACT AS TRUSTEE**