

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

