Estate Administration Process

Discovery

- Goals
- Family circumstances
- Financial picture
- Concerns (what “keeps you up at night”?)
- Vision for your (and your family’s) best future
- New financial, tax and business responsibilities
- Financial Advisor, CPA, Insurance Agent, Banker, Other

Plan

- Court filings
- Tax reduction strategies
- Tax filings
- Trust Administration
- Non-probate assets
- Dealing with business and investment assets, lawsuits
- Assets– preservation and distribution to beneficiaries
- Update beneficiaries’ estate plans; consider disclaimers

Implement

- Execute documents Notary Public
- File with authorities
- Notify appropriate persons
- Execute new/revised estate plans

Monitor

Systems in place to renew Discovery, Planning, and Implementation due to:

- Deaths
- Divorce
- New assets
- New risks
- Births
- Relationship changes
- Affected estate plans
- Other

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