



2020 Packages

Easing Your Pain and Meeting Your Needs, Utilizing My Proprietary System

“Honoring Their Memory” Package - \$2500

My full-service package that will take you step-by-step through administering the estate. This process can take an executor 4-6 months on your own. Together, we can do it much more expeditiously with a better return on investment. You save on attorney fees and get the estate done right.

You will receive:

1. All estate documents organized in hanging files
2. An analysis of your loved one's phone/computer (for estate items)
3. Claims filed for “lost” assets and out-of-state real property
4. A spreadsheet of your loved one's assets
5. A list as to what your loved one's estate may owe
6. All claims filed with financial institutions
7. Identification of family members and beneficiaries

Package also includes:

- Regular email contact with me
- Referrals to trusted professionals
- Quick tips for executors
- List of useful websites and phone numbers
- My signed book, After the Funeral
- Branded swag

“Settling Affairs” Package - \$1250

The “workhorse” package that will meet the needs of most estates. You'll still benefit from my proprietary system and save on attorney fees – in a shorter timeframe than you can do on your own.

You will receive:

1. All estate documents organized in hanging files
2. An analysis of your loved one's phone/computer (for estate items)
3. Claims filed for “lost” assets
4. A spreadsheet of your loved one's assets
5. A list as to what your loved one's estate may owe

Package also includes:

- Regular email contact with me
- Referrals to trusted professionals
- Quick tips for executors
- List of useful websites and phone numbers
- My signed book, After the Funeral

“Getting Started” Package - \$500

A right-sized package for smaller estates and motivated executors. Perhaps your loved one had few assets, or you have prior experience with administering an estate. I'll jumpstart you on the process and anticipate many of your questions. You'll have a roadmap and the confidence to follow it!

You will receive:

1. All estate documents organized in hanging files
2. A customized estate assessment with specific action items for you to complete
3. Claims filed for “lost” assets

Package also includes:

- Quick tips for executors
- List of useful websites and phone numbers
- My book, After the Funeral