

THE MORTALITY MENTOR®

THE GREAT ADMIN TRANSFER™

2026 MEDIA KIT

Original research from The Mortality Mentor® examining the practical and administrative realities surrounding incapacity and loss.

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MEDIA CONTACT

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The Mortality Mentor® Study Finds Small Estates Can Still Create Big Administrative Burdens After a Death

The Great Admin Transfer™ shows administrative complexity can persist despite legal documents and organized information

ST. LOUIS, Mo. - The Mortality Mentor® today announced the release of The Great Admin Transfer™, a 2026 research report based on an exploratory study of the practical and administrative realities people encounter when managing another person's affairs during incapacity and after a death. Fielded from July through August 2026, the study generated 72 completed responses from people with lived experience and professionals whose work intersects with these responsibilities. The study was designed to identify patterns and areas for further discussion and research, not to produce nationally representative estimates.

"The Great Wealth Transfer gets the headlines, but before assets can move, somebody has to do the work," said Robin Huffman, founder of The Mortality Mentor® and author of the report. "The Great Admin Transfer is the paperwork, decisions, coordination and follow-through that people actually have to navigate, no matter how much or how little is left behind."

The findings suggest that a smaller estate does not necessarily mean a simpler administrative experience. Among lived-experience respondents, 53% reported managing estates valued below \$500,000, including 24% below \$100,000. Home/Property was the most frequently identified area of difficulty at 59%.

"More wealth can add complexity. Less wealth does not remove it," Huffman said.

The work also rarely unfolded as neatly as a checklist might suggest. Lived-experience respondents rated the difficulty of managing another person's affairs an average of 3.94 out of 5 compared with what they had expected. Among professional respondents, 64% identified "not knowing where to start" as the most common problem they observe. Prior experience did not necessarily translate into personal preparedness: only 24% of respondents with prior executor experience considered themselves well prepared with their own affairs.

"The Great Admin Transfer is the paperwork, decisions, coordination and follow-through that people actually have to navigate before assets can move, no matter how much or how little is left behind."

The work can remain difficult even when a person has prepared with legal documents and organized information. "Having authority did not always make the process easier," Huffman said. "Even people with the right documents and some level of organization could still encounter delays and friction when the plan met real-world institutional processes."

The report brings these patterns together through the SOS Framework: Shared, reflecting how administrative burden can cross estate sizes and circumstances; Overload, reflecting how the work

rarely follows a tidy sequence while grief, caregiving and competing responsibilities continue; and Systemic, reflecting friction across organizations with different processes, requirements and points of contact.

“Life’s hardest transitions shouldn’t require families to become project managers,” Huffman said. The report identifies practical opportunities to reduce the burden, including making essential information easier to find and use, strengthening professional guidance and handoffs, and improving organizational processes so people do not have to navigate each institution as a separate puzzle.

The Great Admin Transfer™ is intended to inform both personal preparedness and organizational improvement. Its findings may be relevant to individuals and families, financial institutions, healthcare organizations, government agencies, employers, legal professionals, funeral professionals, and other organizations whose processes intersect with serious illness, incapacity and death.

Read the report and access media resources at themortalitymentor.com/research

About The Mortality Mentor®

The Mortality Mentor® is a consulting and education business focused on the practical and administrative realities surrounding incapacity and loss. Its work serves individuals and families navigating these responsibilities as well as the organizations whose processes shape their experience. Services include research, education, speaking, after-loss support and consulting focused on making difficult processes more understandable, navigable and human.

About the Research

The Administrative Reality of Loss Research Study was conducted from July through August 2026. The exploratory survey included participants with lived experience managing another person’s affairs and professionals whose work intersects with incapacity, death and after-loss responsibilities. The study generated 72 completed responses and was designed to identify patterns, experiences and areas for further discussion and research. It was not designed to be nationally representative.

Media Contact

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MEDIA FACT SHEET

THE GREAT ADMIN TRANSFER™

Before assets can move, someone has to do the work. The Great Admin Transfer™ examines the paperwork, decisions, coordination and follow-through people navigate during incapacity and after a death.

72	JUL-AUG 2026	2 PERSPECTIVES	EXPLORATORY
completed responses	survey fielded	lived experience + professionals	not nationally representative

SELECTED FINDINGS

53%

A small estate does not necessarily mean a simple estate.

Of lived-experience respondents reported managing estates below \$500,000. A modest estate can still involve a home, debts, belongings, multiple institutions, digital accounts, government processes and missing information.

59%

Home/Property was the top area of difficulty.

A house can represent far more than an asset. It can involve maintenance, insurance, utilities, belongings, repairs, mail, sale preparation, family decisions and emotional attachment.

24%

Prior experience did not necessarily equal preparedness.

Of respondents with prior executor experience considered themselves well prepared with their own affairs.

64%

Knowing where to start is a major challenge.

Of professional respondents identified “not knowing where to start” as the most common problem they observe.

3.94 / 5

The work was harder than many expected.

Average difficulty rating among lived-experience respondents compared with what they expected.

“More wealth can add complexity. Less wealth does not remove it.”

Robin Huffman, The Mortality Mentor®

THE SOS FRAMEWORK

SHARED Administrative burden can cross estate sizes and circumstances. More wealth can add complexity. Less wealth does not remove it.	OVERLOAD Grief, caregiving and competing responsibilities collide with work that rarely follows a tidy sequence.	SYSTEMIC Legal authority and preparation do not eliminate friction across organizations with different processes and requirements.
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WHY IT MATTERS

Much of the public conversation focuses on wealth, legal documents and assets. The Great Admin Transfer™ looks at the work that has to happen before and around those assets: paperwork, decisions, coordination and follow-through.

THE PRACTICAL OPPORTUNITY

The challenges are not inevitable. The report points to practical ways to reduce friction by making information easier to find and use, clarifying next steps, strengthening guidance and handoffs, and improving organizational processes.

Source: The Great Admin Transfer™, The Mortality Mentor®, 2026. Findings are from an exploratory study and are not nationally representative.

MEDIA NOTES

Story angles, accurate study language, interview prompts and quotable lines

STORY ANGLES

A small estate does not necessarily mean a simple administrative experience.

Among lived-experience respondents, 53% reported managing estates below \$500,000. More wealth can add complexity. Less wealth does not remove it.

Before assets can move, someone has to do the work.

The Great Wealth Transfer focuses on what changes hands; the Great Admin Transfer focuses on the paperwork, decisions, coordination and follow-through required to make that transfer possible.

The house became the project.

Home/Property was the top area of difficulty among lived-experience respondents, reflecting the many practical and emotional responsibilities tied to a home.

Authority does not eliminate friction.

Even people with legal documents and organized information can encounter delays and inconsistent institutional processes.

WHAT JOURNALISTS CAN ACCURATELY SAY

- “In a 2026 exploratory study of people with lived experience and professionals whose work intersects with incapacity and loss...”
- “Among respondents with lived experience...”
- “Professionals participating in the study reported...”
- “Among respondents with prior executor experience, 24% considered themselves well prepared with their own affairs.”
- “The findings suggest...”

Avoid: “59% of Americans...,” “Most executors are unprepared,” or “The study proves...” The sample was not designed to represent the U.S. population.

QUOTABLE LINES

“The Great Wealth Transfer gets the headlines, but before assets can move, somebody has to do the work.”

“More wealth can add complexity. Less wealth does not remove it.”

“The house became the project.”

“Having authority did not always make it easier.”

“Because grief and a to-do list don’t mix.”

“Life’s hardest transitions shouldn’t require families to become project managers.”

SAMPLE INTERVIEW QUESTIONS

1. What is the Great Admin Transfer, and how is it different from the Great Wealth Transfer?
2. What did the study reveal about smaller estates?
3. Why did Home/Property emerge as such a significant challenge?
4. Why can people still encounter difficulty even when legal documents and organized information are in place?
5. What does “not knowing where to start” look like in practice?
6. What practical changes could individuals, professionals and organizations make?

MEDIA CONTACT

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ABOUT ROBIN HUFFMAN

Founder, The Mortality Mentor® | Author, The Great Admin Transfer™

SHORT BIO

Robin Huffman is the founder of The Mortality Mentor®, a business focused on the practical and administrative realities surrounding incapacity and loss. Her work brings together more than 20 years of experience in change management and communications in the financial services industry with a long history of facilitating grief and bereavement support. She is an After-Loss Professional and the author of The Great Admin Transfer™, a 2026 research report examining the work people navigate when plans meet real-world execution.

EXTENDED BIO

Robin Huffman is the founder of The Mortality Mentor®, a business focused on making the practical and administrative realities surrounding incapacity and loss easier to understand and navigate.

Her work brings together more than 20 years of experience in change management and communications in the financial services industry with a long history of facilitating grief and bereavement support. She has facilitated adult grief groups, served on the board of an organization supporting grieving children and teens, volunteered in hospice, and trained as a death doula.

Huffman is an After-Loss Professional and the author of The Great Admin Transfer™, a 2026 research report examining the administrative work people encounter when managing another person's affairs during incapacity and after a death. Her work focuses on the space between planning and execution: what happens when someone must locate information, manage property and accounts, work across institutions, understand authority, and make decisions while also navigating grief, caregiving, or major life transitions.

She speaks, educates and consults on after-loss support, preparedness, administrative burden, customer experience and opportunities for systems improvement.

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