TWINBRIDGE
FINANCIAL CONSULTING, LLC

*Working with clients
for the long run.*

COST-EFFECTIVE APPROACH
ESTATE SETTLEMENT SERVICES

When faced with the many challenges of managing a loved one's estate, Twinbridge offers a cost-conscious approach to settlement. During the difficult time following the loss of a family member, Twinbridge functions in many capacities. Similar to the relationship Twinbridge plays overseeing financial management, we work independently as a liaison with lawyers, paralegals and accountants to coordinate professional efforts and assure that the estate is settled in a timely and cost-efficient manner.

Twinbridge Estate Settlement Service includes:

- Work closely with the executors,
- Attend meetings with executors, lawyers, accountants,
- Coordinate paperwork (death certificate, short certificate, car titles, etc.),
- Transfer or cancel subscriptions,
- Assist with insurance claims,
- Manage professional appraisals for the estate, including furniture, jewelry, and other valuables,
- Make arrangements to sell items not distributed to heirs,
- Support family with packing and transportation needs.

Please contact Twinbridge to discuss how our unique estate settlement services might benefit your family.

*Building and protecting
your wealth.*

THE BOTTOM LINE

Twinbridge helps clients achieve their financial goals through a network of carefully screened managers who are experts in their fields and have dedicated research analysts to support portfolio decisions. Generally, there is no fee for the initial consultation as well as the on-going services:

- Evaluating your financial situation
- Selecting a financial manager
- Working to achieve your financial goals
- Maintaining & enhancing your current lifestyle
- Partnering with you for the long term