SOLUTION GUIDES PRESENTS

Inheritance Intelligence Pack

Your Complete Blueprint for Navigating Inherited Assets, Estate Planning & Property Decisions with Confidence

From inheritance to foreclosure. From trusts to contractors. One pack. Total clarity.

WHAT'S INSIDE THIS PACK

1

Inheritance Roadmap

Step-by-step guide from notification through final asset distribution to the rightful heirs.

2

Tax & Title Clarity

Navigate estate taxes, stepped-up basis, IRS reporting, and retitling with total confidence.

3

Decision Frameworks

Evaluate every asset — sell, keep, rent, donate, or transfer — with a structured approach.

TOPICS COVERED IN THIS PACK

- Inheritance Roadmap — From Notification to Distribution
- Tax & Title Clarity — Estate Taxes & Stepped-Up Basis
- Decision Frameworks — Sell, Keep, Rent, or Donate
- Homeowners Facing Foreclosure — Know Your Rights
- Pre-Foreclosure Options — Stop It Before It Happens
- Getting Cash After Foreclosure on Your Home
- Mineral Rights — What You Own Under the Ground
- Before You Enter an Assisted Living Facility
- The Right Way to Create a Trust
- Only One Sibling — How to Write the Will
- Power of Attorney — What It Really Means
- Transfer on Death — Deeds, Accounts & Vehicles
- How to Pick the Right Contractor
- HOA Laws, Code Enforcement & Senior Repair Programs

"Most families receive an inheritance without a plan. The Inheritance Intelligence Pack changes that."

Inside the Pack — Full Topic Coverage

Every topic is designed to arm you with knowledge before you need it most.

ESTATE & INHERITANCE ESSENTIALS

Inheritance Roadmap

- Notification process & death certificates
- Locating and probating the will
- Working with estate attorneys
- Asset inventory & appraisal
- Distribution timeline & legal deadlines

Tax & Title Clarity

- Estate vs. inheritance taxes explained
- Stepped-up basis & capital gains
- IRS Form 706 & filing deadlines
- Retitling real estate, vehicles & accounts
- Beneficiary designations that override wills

Decision Frameworks

- Sell vs. keep vs. rent analysis
- Donating assets for a tax benefit
- Managing inherited business interests
- Liquidating personal property efficiently
- Working with estate sale professionals

REAL ESTATE & FORECLOSURE DECISIONS

Homeowners Facing Foreclosure

- Understanding the foreclosure timeline
- Your legal rights as a homeowner
- Communicating with your lender
- Loss mitigation & forbearance options
- When to seek HUD-approved counseling

Pre-Foreclosure Options

- Loan modification — what qualifies
- Short sale strategy & lender approval
- Deed in lieu of foreclosure explained
- Refinancing when credit is damaged
- Bankruptcy's role in stopping foreclosure

Getting Cash After Foreclosure

- Surplus funds — what they are
- How to file a surplus funds claim
- Working with surplus recovery attorneys
- Timeline for receiving your funds
- Avoiding surplus recovery scams

Mineral Rights

- Surface rights vs. mineral rights
- How mineral rights are inherited
- Leasing vs. selling mineral rights
- Royalty income — taxes & reporting
- Researching mineral rights ownership

LEGAL PLANNING ESSENTIALS

Before Entering an Assisted Living Facility

- Medicaid 5-year lookback rule explained
- Protecting the family home from Medicaid
- Legal spend-down strategies
- Veterans benefits for assisted living costs
- When to involve an elder law attorney

The Right Way to Create a Trust

- Revocable vs. irrevocable trusts
- Funding the trust — the step most miss
- Naming trustees & successor trustees
- How trusts bypass probate entirely
- Trust amendments & restatements

Only One Sibling — Writing the Will

- Why a will still matters with one heir
- Naming an executor with limited family
- Specific bequests vs. residuary estate
- Guardianship designations
- Keeping the will updated after life events

Power of Attorney

- Durable vs. springing power of attorney
- Financial POA — what an agent can do
- Healthcare POA vs. living will
- How to revoke a power of attorney
- When courts can override a POA

Tools, Protections & Local Resources

From your property rights to your contractor choices — we cover the details that protect you.

PROPERTY TRANSFER & HOME SERVICES

Transfer on Death (TOD)

- TOD deeds for real estate by state
- Payable-on-death (POD) bank accounts
- TOD for brokerage & investment accounts
- Vehicles — how to add a TOD designation
- How TOD overrides a will & avoids probate

How to Pick the Right Contractor

- Verify license, bond & insurance first
- Always get 3 bids — what to compare
- Red flags in contractor contracts
- Lien waivers & payment schedules
- Use the BBB & verified review sources

Contractor Rights & Disputes

- Your rights when work is substandard
- Filing a complaint with the state board
- Mechanic's liens — how to fight them
- Small claims court for contractor disputes
- Legally withholding final payment

COMMUNITY PROTECTIONS & SENIOR RESOURCES

HOA Laws — Your Rights

- What HOA boards can & cannot enforce
- Disputing fines & violations legally
- Attending & speaking at HOA meetings
- Requesting HOA financial records
- State-specific homeowner protections

Using Code Enforcement to Help You

- Filing a code complaint on a neighbor
- How code enforcement protects home value
- What inspectors look for & timelines
- Following up when nothing is done
- Using city records to document violations

Senior Home Repair Programs

- HUD Title 1 home improvement loans
- USDA Section 504 repair grants
- State & local weatherization programs
- Area Agency on Aging repair assistance
- How to apply & income qualifications

WHO THIS PACK IS FOR

The Executor

Named to manage an estate and unsure where to start —

Adult Heirs & Families

Navigate shared inheritance, family decisions, and asset

Homeowners at Risk

Facing foreclosure, HOA disputes, or contractor

Proactive Planners

Prepare your family for smooth wealth transfer with

this pack gives you a clear action plan.	division with less conflict and more clarity.	problems — know your rights before it's too late.	trusts, wills, POA, and TOD documents in place.

$84 Trillion	**70%**	**1 in 3**
Expected U.S. wealth transfer by 2045	Of heirs lose their inheritance within 2 generations	Families report conflict during estate settlement

Ready to Navigate Your Inheritance with Confidence?

Contact Solution Guides today to receive your Inheritance Intelligence Pack. Whether you're settling an estate, protecting your home, planning a trust, or navigating foreclosure — we have the tools you need.

📞 Call 682-235-8217 Today

solution-guides.com | Available by Appointment

This pack is for educational and informational purposes only and does not constitute legal, financial, or tax advice. Please consult a licensed attorney, financial advisor, or tax professional for guidance specific to your situation.