



# Schedule of Services

## Packages

Tasks	Executor Pre-Planning (Pre-Death)	Full Settlement (Post-Death)	Custom Support (Pre-Post)*
Create Password Repository	X	X	X
Asset/Debt/Credit Search	X	X	X
Asset Inventory	X	X	X
Debt Inventory	X	X	X
Profile Clean-up	X	X	X
Identify High Value Assets	X	X	X
Secure Appraisals	X	X	X
Provide Referrals for Estate Team	X	X	X
Identify Recurring Bills (Schedule)	X	X	X
Inventory Investments	X	X	X
Identify & Capture Online Profiles	X	X	X
ID, Locate, Secure Estate Planning Documents	X	X	X
Assist with Funeral Pre-Planning	X	X	X
Provide Estate Prep Documentation (Executor Handbook)	X	X	X
Create Estate Settlement Timeline		X	X
Close Inactive Accounts		X	X
Assist with Processing Life Insurance		X	X
Locate/Process/Secure Pensions, Stocks, Bonds, Mutual Funds, SS, LTD, LTC, VA, Mil Retirement, 401K-403B, etc.		X	X
Provide Monthly Estate Summary and Progress Reports		X	X
Locate/Process Business Ownership-Investments		X	X
Provide Estate Summary for Income Tax Purposes		X	X
Assist with Real Estate Management, Maintenance, Repairs and Upgrades		X	X
Assist with Sale of Real Estate		X	X

*\*Custom services are provided & quoted based on the current state of estate settlement and remaining required tasks.*