

# **Our Process**

### Step One

• Schedule an appointment with a dedicated Estate Consultant who will work as an advocate to assist the family with their loved one's estate needs.

### **Step Two**

 Families have the option to purchase full-service assistance where an Estate Specialist helps make all the necessary notifications for the family.

#### **Step Three**

 Families who purchase the full service receive ongoing support until all tasks are completed.



Over the phone, our team will work with you every step of the way to manage the following:

## **Government Benefits**

- Social Security
- . Veterans Administration
- OPM

#### Finances

- Pension Plans
- 401K/IRA/Annuities
- Credit Cards
- Bank Accounts

#### Insurance

- Life Insurance
- . Medicare/Health Insurance
- Car/Home Insurance

## **Estate Education**

- Wills/Trusts/Probate
- Real Estate Title
- . Vehicle Title
- Change Beneficiaries

## Protection

- Credit Bureaus/Fraud Alert
- Stop Junk Mail/Solicitor
- Phone Calls
- Deceased Registry

