

# THE PROBATE RESOLUTION PROCESS™

## 5. THE PROBATE RESOLUTION™

This is the final phase of resolving your probate matter. The legal work is completed, the assets are distributed, final details are handled and the estate is closed. We work with you to ensure that there are no lingering items remaining with the estate. You have confidence that you have diligently fulfilled your role in the settlement of the estate.

## 4. THE ACTION ACCELERATOR

Our team initiates the legal formalities of the probate process. We provide you with progress reports and updates along the way. Our invaluable assistance with asset preservation and liquidation will help support you in fulfilling your executor duties and provide you peace of mind. We will support you through all phases of this step and help make any required adjustments to the plan.

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## 1. THE PROBATE INQUIRY™

Most probate work begins with a phone call to our office. It is a time for us to listen and learn about your situation, answer your questions and assess whether our firm is the best to help you with your probate issues. If an initial consultation is recommended, we request that you meet with us in person and bring relevant documents.

## 2. THE PROBATE PARTNERSHIP

During the consultation, you learn how the probate process works and how our probate team works in conjunction with you and your family. In addition, we perform an initial review of your documents and together we define the scope of assistance you need to bring estate closure. You leave this meeting with initial clarity and confidence about the direction that will be taken.

## 3. THE RESOLUTION GAMEPLAN

Our team meets internally to compile a comprehensive outline of all goals and related action steps required to resolve your probate matter. We design a plan that will guide you through the probate process and assist you in understanding and performing your executor duties.