YOUR PROBATE ADMINISTRATION ROADMAP

A Step-by-Step Path to Your Family's Peace of Mind

1 PERSONAL CONSULTATION
Meeting #1

60-90

✓ Personal Consultation
- Discuss your personal & family situation
- Outline process of probate proceedings
- Obtain information needed to open probate
  - If decedent had a Will – Testate
  - If decedent had no Will – Intestate

1 Week

2 SIGN OPENING DOCUMENTATION / IDENTIFY ESTATE ASSETS
Meeting #2

60-90

- Sign all paperwork needed to start probate proceeding
- Obtain bond (if necessary)
  - Pay bond premium
- Obtain consent from heirs (if necessary)
- Begin identification of assets

6-8 Weeks

3 APPROVAL OF THE COURT / PREPARE INVENTORY

- Obtain "Letter Testamentary" or "Letters of Administration" from Court
- Publication for potential creditors of the Estate
- Inventory and Appraisement - due 30 days from appointment as Personal Representative
  - Deliver supporting documentation detailing the value, on the Date of death, of each Estate asset

Within 30 days

4 ESTATE ADMINISTRATION
Meeting #3

60-90

- Bring in all asset Date of Death valuations for the signing of the Inventory
- Discuss and begin consolidating assets into an Estate account
- Await the six-month statutory period

6-8 Months

5 CLOSING PROBATE
Meeting #4

60-90

- Deliver Estate account statements for compilation of Estate accounting
- Review and sign closing documentation
- Hold beneficiary consultations to discuss expectations, tax consequences, and liabilities
- File income taxes for estate

6 PLAN FOR YOUR ESTATE

✓ **You have now seen first-hand the administration of a full probate estate. Put your estate plan into your own hands and make a plan that works for your family.**

✓ **Don't procrastinate, secure your family's legacy today!**

Client Services

Estate Legacy Planning

Helping families gain the peace of mind that they have a personalized estate plan with professional guidance through our law firm family.

- Living Wills, Health Care Directive, Powers of Attorney, Wills, Incapacity Planning
- Living Trust
- Special Needs Planning
- Family Limited Partnerships
- Complex Charitable Giving

Financial Planning Assistance

Helping clients preserve their wealth and achieve their long-term financial goals by coordinating with their financial planners

Elder Law, Medicaid Services, & Long-Term Care Planning

Helping clients qualify for government benefits legally and ensuring their estates are preserved in the process.

- Medicaid Application
- Veterans Aid & Attendance Application
- Social Security Disability Assistance (SSD) / Social Security Supplemental Security Income (SSI) assistance

When a Loved One Passes Away

Relieving the burden on families by providing the peace of mind of professional assistance in the administration of their loved one's estate plan

- Trust Administration
- Probate Administration

At *Amen, Gantner, & Capriano,* we pride ourselves in embracing our clients into our law firm family. Our goal is to provide exceptional legal services through all of life's stages. From planning for their estate to helping their family in the administration after they have passed away.

OUR MISSION

"To help families secure their legacy by embracing each client as a member of our law firm family through long-term, personal advisory relationships."

Helping Families Secure Their Legacy

Member of
The American Academy of Estate Planning Attorneys
National Academy of Elder Law Attorneys
Estate Planning Council of St. Louis

Accredited by
United States Department of Veterans' Affairs

Amen, Gantner & Capriano
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For FREE consumer reports, articles and estate planning seminars, please visit our website

www.YourEstateMatters.com

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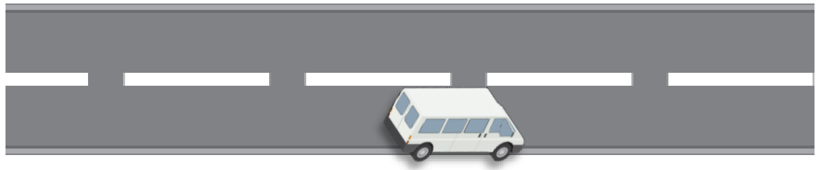

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