

Personal Affairs Administrator, Inc. offers a range of services to assist with settling an Estate I work in collaboration with attorneys and Executors/Administrators

Benefits to Attorneys:

- Improve productivity within your firm
- Expedite your client's probate and estate administration process
- Lessen the burden on you and your staff by having additional support for non-legal tasks
- Maintain exceptional client service without adding to your staff

Work can be done in your office, off-site or in the client's home.

Benefits to Executor/ Administrator & Family:

- Maintain control as Executor/ Administrator while allowing a responsible professional to complete the extensive list of time consuming tasks
- Ensure adherence to court deadlines
- Expedite transfer of non-probate assets
- Settle the estate in a timely manner

I can assist you with any or all of the responsibilities involved.

Support Services Include:

Initial Responsibilities

- Review the decedent's files/ paperwork and organize all information
- Create a plan of action
- Notify beneficiaries, the SSA, USPS, credit card, financial and insurance institutions, credit reporting agencies, utilities and landlord/HOA
- Cancel home services, ongoing automatic checking account withdrawals, periodicals

Locate, Appraise and Inventory Assets/Debts

- Research and prepare Inventory of Assets and Debts
- Obtain appraisals on art, antiques, furniture, jewelry and other valuables
- Assist in filing claims for insurance and other asset transfers
- Contact, process and follow through with Office of Unclaimed Funds

Create Estate accounts

- Help obtain tax id number and open Estate brokerage and bank accounts
- Arrange for the payments of debts and expenses

Create/Maintain Records

- Track Estate expenses
- Keep records of expiration dates for all matters related to the Estate including Bonds and Letters Testamentary or Administration
- Provide ongoing status reports of all assets

Distribution of Personal Property and Home

- Assist Executor/Administrator with distribution of assets
- Provide heirs and beneficiaries with updated summary of property not included in the Will
- Interview and hire professionals for home/ property sale
- Interview and hire shippers, movers and cleaning service
- Coordinate the sale of real estate
- Help with automobile transfer of title or sale

Settle the Estate

- Organize/summarize receipts, records of activity and evidence of disbursements
- Provide documents to CPA for Estate tax returns