When there's more than grief to manage

undermountain
partners

AFTER-LOSS SUPPORT

compassionate project management for the busy and bereaved

GUIDANCE

Expert help navigating and prioritizing executor tasks.

Our proprietary framework brings structure to the unfamiliar work after a loss.

PERSONALIZATION

Not another cookie-cutter checklist.

Every life is unique, and so is every executor's job. Our process flexes accordingly.

CONTINUITY

Compassionate support from start to finish.

Regular meetings and task-tracking keep the work moving forward.

One project. Many moving parts.

Specialists manage their areas. We coordinate the work across them.



Undermountain Partners does not provide legal, financial, or tax advice.

Support may include:

- Asset, debt & insurance-policy discovery
- Death notifications
- Coordinating information for attorneys & courts
- Family communication
- Task prioritization & tracking
- Executor-process education
- Non-financial account closures
- Provider referrals & coordination

For when...

A family doesn't know where to start with the practical work after a loss.

A client brings you practical questions that fall outside your role.

An executor is visibly overwhelmed by the volume of tasks.

A surviving spouse keeps asking, "What do I do next?"

Have someone in mind?

Feel free to make an introduction.
Or we can discuss your client's situation to determine fit before you refer them.

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