Organized today.
Easier tomorrow.

undermountain
partners

ESTATE ORGANIZATION SERVICES

for a thoughtful transition to loved ones

GUIDANCE

Expert help navigating what to document and why.

Our proprietary organization framework brings structure to an unfamiliar task.

PERSONALIZATION

A comprehensive framework, adapted to real life.

Every client's circumstances are different. The process & deliverable flex accordingly.

MOMENTUM

Support and accountability from start to finish.

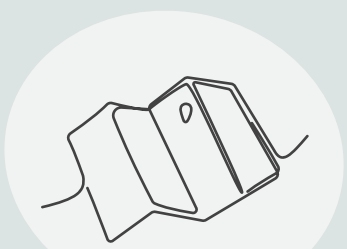
Regular meetings keep an easy-to-postpone project moving toward completion.

An enhancement to estate planning



Attorneys and financial advisors put the legal and financial pieces in place.

They build the structure.



We organize the practical and personal information their family will need to carry out the plan.

We provide the roadmap.

Truly Comprehensive Organization

Financial

- Bank and investment accounts
- Real estate
- Niche assets
- Valuable tangible property
- Loans and credit cards

Digital

- Device access
- Memberships and subscriptions
- Social media legacy settings

Personal

- End-of-life wishes
- Funeral plans
- Legacy messages and ethical wills
- Sentimental items

For when you hear...

> *"I keep meaning to get my affairs in order, but I never get around to it.*

> *"Someday I'll have to settle Mom's estate, and I have no idea where anything is.*

> *"I'm worried about the mess I'm leaving behind for my kids.*

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.

Tracy Flynn
tracy@undermountainpartners.com
(917) 583 - 5438
undermountainpartners.com