

# Estate Administration:

# The Critical Opportunity



- Unprecedented transfer of wealth
- Growing administration burdens
- Heightened client expectations
- Rising T&E malpractice claims
- Pressure to reduce fees

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# Three Key Capabilities

## Transforming Estate Administration

### THE PROBLEM

- Significant administrative tasks oversight risk
- Time-consuming court document & letter preparation
- Complex fiduciary accounting demands

### THE OPPORTUNITY

Implement systematic processes that protect while adding value

# Advising Executors on their Duties: Never Miss a Critical Step



## THE PROBLEM

- Hundreds of administrative tasks
- Every estate is unique
- Risk of missed deadlines
- Rising malpractice claims

## THE SOLUTION

- Massive jurisdiction-specific task repository
- Smart task dependencies and deadlines
- Real-time collaboration tracking
- Automatic documentation for audit trail

- 5 Notify Employers(s) and Claim any Outstanding Pay or Benefits

See how our comprehensive checklists ensure nothing falls through the cracks →

# Court Form & Letter Generation: From Hours to Minutes



## THE PROBLEM

- Time-consuming manual form completion
- Version control issues
- Complex signature tracking
- High risk of errors

## THE SOLUTION

- Intelligent document assembly system
- Jurisdiction-specific form automation
- Built-in verification controls
- Complete documentation history

P-3.0110 - Petition For Administration (testate  
Florida Resident--multiple Petitioners And Single Pr

Watch as we transform document preparation →

# Fiduciary Accounting: Precision at Scale



## THE PROBLEM

- Manual transaction inputs
- Statement reconciliation challenges
- Time-consuming report preparation
- Error-prone processes

## THE SOLUTION

- Automatic statement imports
- Smart transaction categorization
- Court-ready accounting formats
- Informal accounting reports
- Detailed audit trail maintenance

 **ABC Virtual Bank**  
Account Number: 123456789

Value (CAD) View Holdings



No more manual data entry or offshore teams →

# Complex Estate Scenario in Action

## SCENARIOS

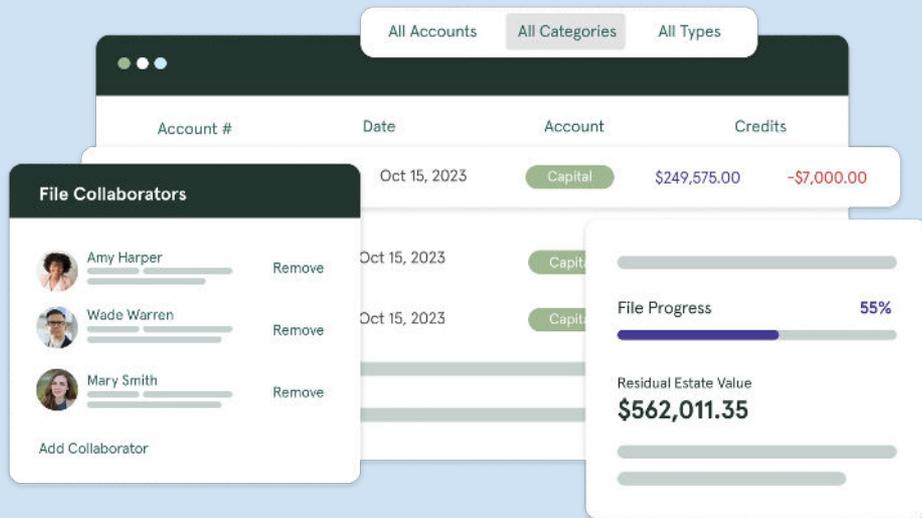
- NY CPA firm senior executive
- Complex real property portfolio
- Complex portfolio of personal assets
- Special needs beneficiary



## ESTATEABLY SOLUTION

- DecisionVault integration for instant data import
- Personalized, jurisdiction-specific task lists
- Complete action tracking
- Real-time compliance documentation

# Transform **Your Practice**



## MEASURABLE IMPACT

- ✓ Complete administrative tasks 10x faster
- ✓ Reduce administration errors to near-zero
- ✓ Automatic compliance documentation
- ✓ Transparent stakeholder updates
- ✓ Multi-generational relationship building

# Scale Your Practice Efficiently

## Transform estate administration into:

- A complementary service offering
- A systematic, protected process
- A multi-generational relationship builder
- A practice growth engine

