



The Master File

The Estate Planning Piece Most People are Missing

The reason most of us have an estate plan is to make things as stress free as possible for those we leave behind. That's why we spend the time and money necessary to get our estate planning documents in order and make sure our beneficiaries are up to date. But without proper organization, our family can still be left with a mess.

We recently helped a client whose mother passed away. She and her siblings had to rummage through their mother's home looking at every sheet of paper to try to figure out what all she had and where it is. It took days. And they're still not sure they found everything. There could be a life insurance policy, retirement account, or bank account that their mother owned that they are simply unaware of.

The Master File is an organizational tool to keep all of the documents needed for when someone passes away. When helping a client create a Master File, we provide a list of documents we'll need and help them collect the necessary information. People are very often surprised at how much information and documentation is necessary. We even include the names and contact information for any professionals they may work with, such as CPAs and attorneys. Once the Master File is completed, we will reach out to our clients' heirs or executor to notify them that if something were to happen to our clients, we have all of the information to help them go through the necessary steps taken after someone passes away. Our firm will even help our clients' heirs or executors file claims, if necessary.

We believe that the Master File is the missing crucial piece in most people's plan. If you don't have a Master File, call us. We'd be happy to help you get started.



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