HOW WE CAN HELP

On the Horizon is a Michigan CPA firm providing guidance and resources for your situation. We coordinate between core professionals (attorney, financial planner and CPA) interpreting their lingo and educating you along the way. Services enable the aging and their families to make one informed decision at a time.

Services range from financial estate coordination to estate administration including serving as Financial Power of Attorney, Conservator, Successor Trustee and Personal Representative.

- **Governed by the AICPA Code of Professional Conduct**
- **Decades of experience**
- **Personalized and specialized services**
- **Advocate for the aging**

ON THE HORIZON
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ON THE HORIZON
ESTATE COORDINATION

Are you or an aging loved one dealing with an end of life situation?

Have you been left to administer a loved one's estate?

Do you know where to go for guidance and resources to help you through your situation?

We Can Help!

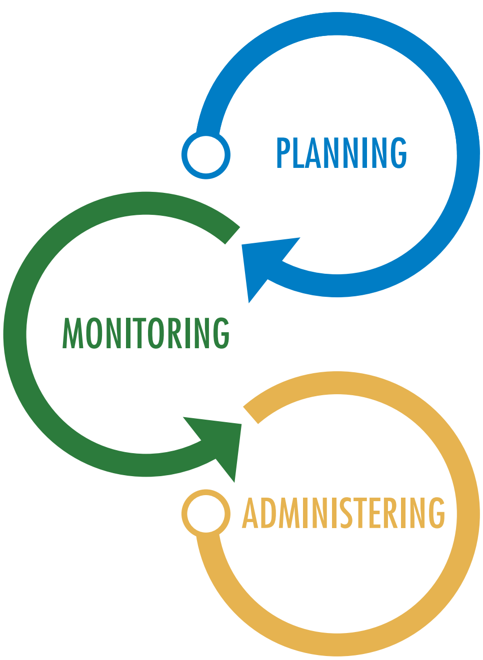
We Specialize in Financial Estate Organization, Professional Fiduciary Services and Consulting

Conservator
Successor Trustee
Personal Representative
Financial Power of Attorney

ESTATE LIFE CYCLE

An estate is everything a person owns, which requires continuous **planning** and **monitoring** for significant life changes (marital status, number of dependents, disability, employment status). Once a person passes, **administering** an estate is vital.

Unfortunately, life doesn't go as planned and lives are disrupted or shortened every day because of unforeseen circumstances either suddenly or gradually over time. These unforeseen circumstances (such as an accident, heart attack, stroke, cancer, and Alzheimer's) can have a devastating impact on a spouse, extended family and friends.



CONSIDER THESE THINGS

- Could someone step in immediately and manage all or part of your life or household?
- Do your loved ones know where important documents are kept?
- Do you or your loved ones know where to go for resources to relieve some of the burden and stress of caregiving?
- Do you have an estate plan (will or trust)? Has it been reviewed in the last year?
- Have you appointed medical and financial powers of attorney if you are unable to make decisions?
- Is there a current inventory of your financial assets (bank accounts, IRAs, annuities, life insurance policies)?
- Have you checked to ensure the beneficiaries on your accounts are aligned according to your wishes?
- Do you have someone in charge that knows what to do in an emergency?
- Is there confusion interacting with core professionals (attorney, financial planner, CPA) or how they fit together?
- In the event of a loved one's death, do you know what to do?

We help the aging and their families navigate through the complexities of stressful and overwhelming life situations.