On the Horizon, PLLC
200 East Big Beaver Road
Troy, MI 48083
586.256.0951

DTrotto@HorizonPllc.com

Overview of Services

Fiduciary Services

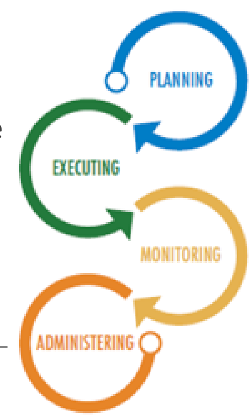
A. Horizon named fiduciary in estate planning documents

- Review and summarize estate plan documents
- Document key information (family tree, professionals and wishes)
- Document financial assets and beneficiary designations

OUTPUT =>

1. Estate Plan Summary (family tree, fiduciaries, beneficiaries)
2. Financial Inventory
3. Tangible Personal Property Template
4. Closing Letter

Estate Life Cycle™



Non-Fiduciary Services

B. Funding coordination and support

- Document financial assets and beneficiary designations (including support)

OUTPUT =>

1. Financial Inventory Summary of Holdings (FISH™) Package (includes overall summary and 6 asset sections)
2. Support Binder
3. Tangible Personal Property Template
4. Closing Letter

C. Estate administration consulting

- Guide and assist the named Trustee through the process of administering the estate; an overview of estate administration includes:

- Reviewing estate plan documents
- Marshalling estate assets
- Preparing inventory
- Re-titling assets
- Providing required notices
- Paying obligations including fiduciary fees
- Keeping beneficiaries reasonably informed
- Starting probate proceedings, if necessary
- Working with professionals to invest assets
- Preparing accountings(s)
- Drafting workpapers for tax return filings
- Making discretionary distributions

D. Estate coordination and support

- Clarify goals and objectives
- Organize financial estate
- Assist with paying monthly bills, balancing checkbook, budgeting and forecasting
- Clarify options for decision making
- Provide recommendations including core professionals, community and other resources

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