

Snapshot

Legal

Assets

The marshalling and identification of all of your loved one's assets. This includes those owned individually, in trust, or in joint name with someone else. Implementation of new tax cost basis and discussion of prudent asset management during the course of the administration with members of your financial team.

One of the first responsibilities of the personal representative/trustee in an estate administration is to marshal the assets, obtain date of death values (for tax reporting purposes) and to determine whether the assets and portfolio should be adjusted to meet the needs of the estate and its beneficiaries. Where the assets are located, how they are titled (owned), and what they consist of drives almost all of the decisions to be made during the course of the administration.

This module contains:

- Asset Conference Agenda
- Estate Asset Organizer
- 3 Administrative Checking Account
- Date of Death Values
- **Appraisals**
- 6 Liquidity/Income Estimator
- Prudent Investor Standard
- Residence Worksheet (where applicable)
- Action Plan
 - Creditors
 - Taxes
 - Distributions
 - Wrap Up



Asset Conference

Team Members to Attend	lnvitees
☐ Attorney ☐ Probate/Trust Coordinator ☐ Funding Assistant	 ☐ Personal Representative/trustee ☐ Surviving spouse ☐ Beneficiaries who would like to participate ☐ CPA ☐ Financial advisor/trust officer

Purpose: To discuss financial issues surrounding the trust administration. It is therefore vital that your financial advisor(s) is (are) present for this meeting either in person or by teleconference.

Asset Conference Agenda

- 1. Open points from last meeting
- 2. Have we gathered all of the assets yet?
- 3. Date of death values adjustment of cost basis
- 4. Opening an estate/trust checking account
 - a. Accounting and clearing items through one account
 - b. Accounting coordinating with our bookkeeper
- 5. Tax Identification number(s)
- 6. Establishing an administrative/probate brokerage account
- 7. Prudent Investor Standard (see pages 3-10, 3-11, 3-12)
- 8. Consolidation of accounts
- 9. Liquidity for taxes/expenses (see page 3-9)
- 10. Income needs of surviving spouse/beneficiaries (see page 3-9)
- 11. Review end of year income distribution requirement
- 12. Discussion of RMD issues for decedent, if any
- 13. Establishment of inherited IRA Accounts (if RPT then separate conference required)
- 14. Insurance claims and Form 712
- 15. Real estate issues
- 16. Tangible personal property appraisal
- 17. Closely held business interest/partnership
- 18. Any other financial issues relevant to administration
- 19. Other trusts where deceased is beneficiary



Estate Asset Organizer

Asset	Individual	Joint	Trust
Cash & Savings Accounts			
Stocks, Bonds & Mutual Funds			
IRA & 401(k)			
Florida Homestead			
Furniture & Personalty			
Real Property			
Vehicles & Boats			
Money Owed to You			
Closely Held Business Interest			
Partnerships, LLCs			
Insurance & Annuities			
Other Assets			



IRAs, 401 (K)s & Qualified Plans

Institution	Account #	Туре	Beneficiary (ies)	Value
		☐ Traditional	□ Spouse % □ Children % □ Other % □ Other %	
		☐ Traditional	□ Spouse % □ Children % □ Other % □ Other %	
		☐ Traditional	□ Spouse % □ Children % □ Other % □ Other %	

Annuities & Life Insurance

Institution	Owner	Туре	Death Benefit
		☐ Life Insurance ☐ Annuity	
		☐ Life Insurance ☐ Annuity	
		☐ Life Insurance ☐ Annuity	



Real Property

List any interest in real estate including your family residence, vacation home, commercial property, vacant land, time share, etc.

General Description	Individual/Joint/Trust	Fair Market Value	Loan Balance
	TOTALS		



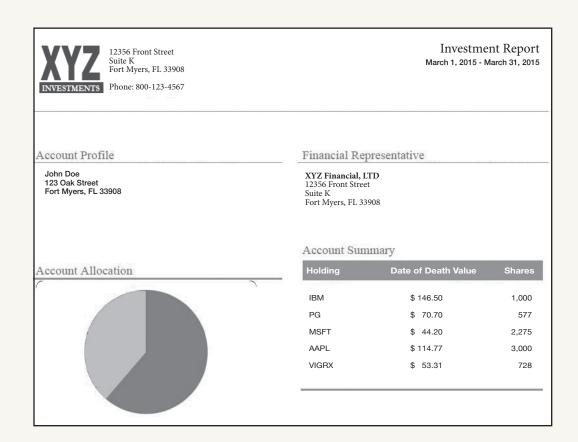
Administrative Checking Account





Date of Death Values

Place worksheets indicated date of death values prepared by bank/brokerage firms here.





Appraisals

Place copies of appraisals here.



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Actual Use as of Eff Summary of Higher home is only in fa		Present use, or	(≥) Other us	e (opiain)	Interim us	as a sing	le family	home until	improver	nents are	razed and site
Summary of Higher home is only in fa	new home that	conforms to	similar new h	homes loc	ated on co	mpetitive v	vide, dire	ct access o	anals.		
home is only in fa	ective Date: Sing	ie Family Ro	sidential					t Singe F			
waterfront lots w											e. The existing
	h wide views. The	the existing to highest and b	yout at the har	me has only	onthi is the	interim use	of the exi	atypical for t	tial imports	eced on pre	ne, direct access.
thilties Pub	c Other Provide	m Description	Ott-site Imp	rosements	Туре	Pu	blic Privati	Tepograph	y Leve	1	0.0000
Bectricity 🗵			Street	Asphalt				Size	Typic	al for Are	0
Gas 🖂	None		Curb/Gutter					Shape		angular, N	AOL
	8-		Sidewalk					Drainage View	Adec	puate	
Sanitary Sewer Storm Sewer	8-	_	Street Lights Alley	None		- 1	릭님	View	200	cana's	
Other sits elements	⊠ Inside Lat	Corner Let	Cull de Sac	Unde	cround Utilit	es (X) Othe	r (describe	View of 2	00" cana	le.	
FEMA Spec1 Flood	Hazard Area 🔀 Yo	s No FEN	A Flood Zone	AE	FEMA	Map # 120	71C0410	F	FEM	A Map Date	08/28/2008
Site Comments:	 improvements 	are razed as	nd the proper	ny is impri	wed with a	new home	e that cor	rforms to s	milar nev	v homes	ocated on
competitive din	ct access water	front sites.									
							_				
General Description	_	Exterior Desi	criation		Foundation	_	Tito	serent	[] None	Meatin	
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# of Stories 1		Exterior Wall	S CBSU	keg.	Crawl Space	te None	%	Finished		O Fool	Electric
Type 🗵 Bet. 🗌	Att. [Roof Surface	E Fbols/	Ava.	Basement	None	- 0	iling			
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		s. Window Typ Storm/Scree			uampness	⊠ Ceiin	g' B	oor utside Entry		Centra	X/Fair
Actual Age (Yrs.) Effective Age (Yrs.)	29	- constraine	ns Yes/A	vg.	Infurtition	None No None No	200	rouse citity_		other	
Interior Description	47	Appliance	1 100	None An	enities	repid No	200			Car Storage	None
	/Carpet/Avg.	Refricerati	or 🗵 Stairs	□ Br	eplace(s) #	0	Woods	toyols) #	0	Garage A	tetrary (2 To
Walls Dr	waliPt/Avg/Fair	Range Ove	m Drop!	Stair 🚫 Pa	to o		_		-	Attach.	2
Trim/Frish W	od/Avg/Fair	Disposal	Scuttle Scuttle	e 🗆 De	ck Woo	d dock				Detach.	
Buth Foor Til	/Aug.	Dishwash		say DPc	rch Scre	ened Lana				BitIn	
Bath Wainscot Ta Doors	(Aug.	Fan/Hood Microwaya			nce Woo	diChainLin	94		_	Carport	-
		Washer D			d <u>0</u>		_	_		Driveway _ Surface	Consuc
Finished area abov	grade centains:	4 Ro	oms	2 Redon	105	1 Ruth	1/3	1.640.5	nigre Feet	of Gross I ly	Concrete Ing Area Above Gra
Additional features											a concrete floor
with a flat roof.	Thorn on fr	lings through	out, formica	counters a	and cabine	ts and holi	ow core	nterior doo	5.		
		including physic	al, functional an	id external ob	isolescence):	Conditio	on of the p	roporty is fair	and has	functional e	stsolescence.
Describe ale count	on of the property (i		age for an adja	comt proper	ty owner an	d the config	guration of	the existing	floorplan i	a atypical f	w the subject's
This house was	on of the property (i viginally built as a	workshop/gars		how indicate	ons of damp	iness where	water pip	es have brok	ie in the at	tic and/or t	here has been Al
This house was prime waterfront	on of the property (i riginally built as a location on 2007 ca	workshop/gars mals. Some o									
This house was prime waterfront problems. The f	on of the property (i riginally built as a location on 200° ca ont bedroom and f	workshop/gan inals. Some o loyechall area	are not air con								
This house was prime waterfront problems. The f existing, original	on of the property (i riginally built as a location on 200° ca ont bedroom and f copper pipes contin	workshop/gan mals. Some o loyenhall area nue to have pri	are not air con oblems with le	aking and a	the coof has		and Owner		et in only	s been issu	es with the final
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This house was - prime waterfrom problems. The I existing, original inspection that h	on of the property (in eigenally built as a location on 200° cur and bedroom and fi copper pipes conti- s not been resolve arred maintenance	workshop/gars imals. Some o loyen hall area nue to have pri ed. The status needed such Copylgeb 200	are not air con obloms with lo of the building	permit for air, painting c. This form no	the roof has pipes and be repositor	A/C.	nout written p	ernission, howe	ct is only i	in fair cond	ies with the final ition with no



Liquidity Estimator

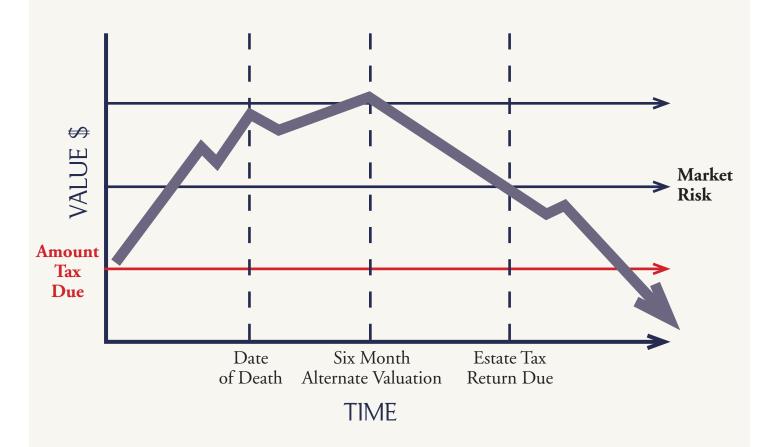
Liquidity	
Liquid Asset Total Administrative Expenses and Taxes	\$>
Overage/Deficit	\$
Liquid Assets	\$

Income Estimator

	Budget	Own	Estate
Spouse Needs			
Beneficiary Needs			
Real Estate/Business			



Prudent Investor Standard - Short Term Market Risk

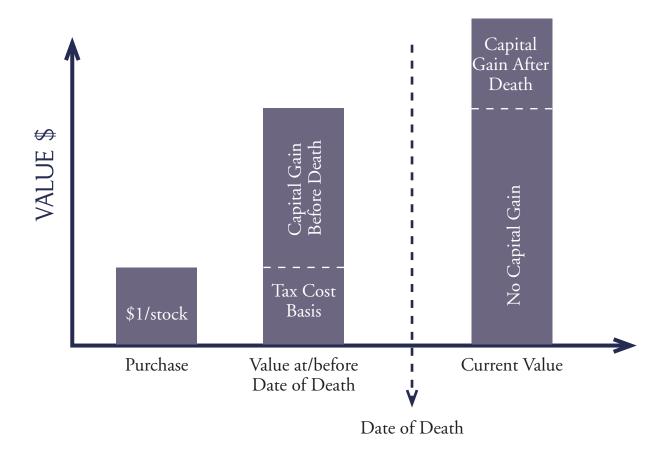


- Taxes based on lower of date of death value or six month alternate valuation date
- Market could significantly drop by estate tax return due date resulting in even greater percentage of portfolio lost to taxes
- Goal is PRESERVATION, not GROWTH, during administrative process



Prudent Investor Standard - Step-Up in Tax Cost Basis

At date of death, assets receive step-up in tax cost basis equal to date of death value eliminating capital gains.



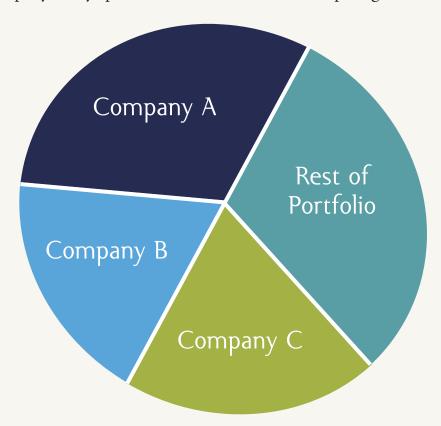
^{*}Does not apply to income with respect to decedent assets such as IRA, 401(k) and annuities.



Prudent Investor Standard - Over-Weighted Portfolio

Why was the portfolio over-weighted?

- Decedent worked for company
- Company always performed well
- Emotional attachment
- Capital gains tax avoidance



Company A = 30%

Company B = 20%

Company C = 15%

Rest of Portfolio = 35%

Market Risk

- Nearly 2/3 of portfolio invested in only three companies
- Step-up in tax cost basis eliminated capital gains
- Personal representative/trustee has personal liability for market risk
- Beneficiary income/investment goals different than decedent's goals
- Solution- rebalance portfolio or go to cash/equivalents



Keeping the Home in the Family



Many families want to keep the deceased's home in the family until they consider:

Carrying Costs

- Mortgage
- Taxes (loss of homestead property tax exemption in FL)
- Upkeep/maintenance
- Insurance

Splitting Up Use

- Christmas vacation
- Spring break
- Family Partnership Agreement

Other Issues

- Sibling fails to pay his/her fair share
- Rental income significantly reduced by management fees
- Need for liquidity in the estate



Conference Action Plan

Action Items	Who's Responsible	By When
1.		
2.		
3.		
4.		
5.		