



# SERVICES | Estate or Trust Administration

LEVEL 1: LIMITED ADMIN	LEVEL 2: REGULAR ADMIN	LEVEL 3: COMPLETE ADMIN
<p>Our <b>Limited Admin</b> service is intended for estates and trusts involving basic matters with a narrow scope. Perhaps a single asset of limited value must be administered. Maybe a simple court filing is coming due. Or a third party requirement must be satisfied. Regardless, situations can be clearly defined and outcomes are predictable. When circumstances do not warrant fuller representation by our firm, this service is a good choice.</p>	<p>Our <b>Regular Admin</b> service accounts for a majority of our estates and trusts work. Most cases exceed the bounds of our level 1 service, whether due to increased assets and/or liabilities, special consideration of interested parties, statutory requirements, or other factors. Moderate risk usually accompanies the circumstances, and outcomes may be less predictable. This service is the right selection when more of our assistance is desired, yet you plan on handling many of the tasks.</p>	<p>Our <b>Complete Admin</b> service suits situations that require us to handle most tasks. Compared with levels 1 and 2, this service offers our highest level of assistance. It is an appropriate option when varying circumstances prevent you from completing much of the administration in a timely manner. Alternatively, you may simply prefer for us to assist you with most of the administration. Either way, you can rely on us to be as helpful as possible.</p>
<p><b>Ideal for:</b> Advising on basic matters with some administration tasks handled by us</p>	<p><b>Ideal for:</b> Advising on more complex matters with some administration tasks handled by us</p>	<p><b>Ideal for:</b> Advising on more complex matters with many administration tasks handled by us</p>
<p><b>Includes:</b> Counsel and related services, often on a fixed fee basis</p>	<p><b>Includes:</b> Counsel and related services, often on an hourly rate basis with a minimum fee deposit</p>	<p><b>Includes:</b> Counsel and related services, often on an hourly rate basis with a higher fee deposit</p>

## OTHER

Our firm can also assist with:

- › Probating a will
- › Facilitating family and fiduciary meetings
- › Preparing documents only
- › Performing an Estate Check<sup>SM</sup> or Trust Check<sup>SM</sup>
- › Recommending estate plan updates for family members
- › Representing fiduciaries or family members in court hearings (limited)
- › Providing fiduciary services (limited)
- › Counseling on other matters as needed

*Additional fees apply.*

## PEACE OF MIND

*A successful administration often takes understanding any combination of legal instruments, North Carolina laws, court procedures, and best practices. Regardless of the service level that you select, our firm will be on hand to advise you in your role as estate representative or trustee so that you can complete your administration efficiently and without costly mistakes.*