



## KISELSTEIN FRANCKOWIAK LAW GROUP

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*“for your peace of mind”*

We would like to extend our condolences on the loss of your loved one. We are honored that you are considering our firm to assist you with the estate administration. Estate administration is the process of transferring assets out of a deceased person's individual or Trust name and distributing the assets to whom they are intended to go to. It is our goal to compassionately guide you through the process of transferring your deceased loved one's assets as smoothly and efficiently as possible while maintaining family harmony.

To maximize the productivity of our meeting, if you are able, please bring the following with you:

1. All estate planning documents prepared by our office or by another attorney (if any);
2. Original Death Certificate;
3. Copies the most recent statements of all assets, (*i.e. brokerage accounts, bank accounts, certificates of deposit; life insurance policies, retirement accounts, IRA's, annuities, 401K accounts, including documentation of beneficiary designations, where applicable, stock certificates, U.S. Savings bonds, real estate titles, and titles to vehicles*), reflecting the decedent's ownership interest, in any of the following ways:
  - Owned by the decedent's Trust;
  - Held in joint tenancy between the decedent and any other individual(s);
  - Owned by the decedent and payable to a beneficiary (insurance policies, IRA's, annuities, etc.);
  - Owned by the decedent (with no beneficiary designation); and
  - Any assets payable to the decedent's Trust as beneficiary (*i.e. insurance policies, annuities, etc.*), upon death.

During our meeting, we will explain all of the steps that are necessary to properly administer the decedent's estate and Trust, including any continuing trust(s) established by the decedent under the terms of the Trust (if applicable).

Depending on various factors (the size of the estate, the types of assets owned by the individual or the individual's trust, the distribution provisions contained in the Trust(s), the family dynamics, applicable estate and income tax regulations), the administration of the estate or Trust can often be complicated. Once we have reviewed the information that is provided regarding the estate plan (if any) and the assets, we will then be in a position to advise you what our fees would be to assist you in the administration process, how you will be billed, and give you a general idea regarding how long the administration will take.

After you understand the tasks that must be completed and the services we will be providing, we will ask you to sign an engagement letter formally hiring our firm to represent you during the administration. We will also request that you provide us with a retainer (check or credit card) to begin the process.

The retainer amount requested is determined by the amount of work we anticipate will be needed to successfully administer the estate/trust and is applied toward the hourly fee charged for the work our firm performs on your behalf. In our experience, a typical retainer ranges from \$1000 to \$5,000, again depending on the scope of work involved. Any individual who pays the retainer amount will be reimbursed from the estate or trust assets.

Please note, you should **not** change or sell assets, change titles, transfer assets, or “roll-over” or withdraw any tax deferred funds, before speaking with an estate planning attorney.

Sincerely,

KISELSTEIN FRANCKOWIAK LAW GROUP