



BERKSHIRE HATHAWAY
HomeServices
PenFed Realty

MARC CORMIER



PROBATE ASSISTANCE PROGRAM

703-445-3550 | 301-660-6272

■ INTRODUCTION

Probate can be an unpleasant stressor while closing the affairs of a beloved friend or family member, especially if that person left some loose strings to tie up. As the Administrator or Personal Representative of the estate, you must find the inner strength to calmly and objectively take on those daunting tasks, and you must accomplish this while you are still grieving. If you have never filled such a role before, you will be in uncharted territory. Your role will be governed by numerous legal mandates, which make the process all the more demanding.

Our company can assist you with many of the details surrounding real property in probate situations. We help clients with more probate actions in one year than most agents will see in their entire career.

With this experience, our team can assist you with repairs on the property to garner the highest sales price. In fact, we can do a little or a lot depending on your needs, even lawn care or snow removal.

Answering family members and creditors can be nerve racking, and you will likely be unprepared for the crush of solicitations and phone calls from real estate agents and investors. The anxiety mounts because you know you must fulfill every letter of the law.

Our company focuses solely on probate real estate. Our experienced professionals will efficiently and compassionately assist you with every aspect of probate real estate. We anticipate your needs and offer solutions designed to execute the estate provisions surrounding real property with the aim of mitigating your stress. Our team has the education and skills to guide you through each step of the estate administration process.

We offer you 100% of our concentration and dedication to your satisfaction. This ensures that you receive the highest service and attention to the details. As a top brokerage in the D.C. Metro, Virginia and Maryland areas, we know that probate laws can vary significantly from region to region, and we use that knowledge to your benefit.



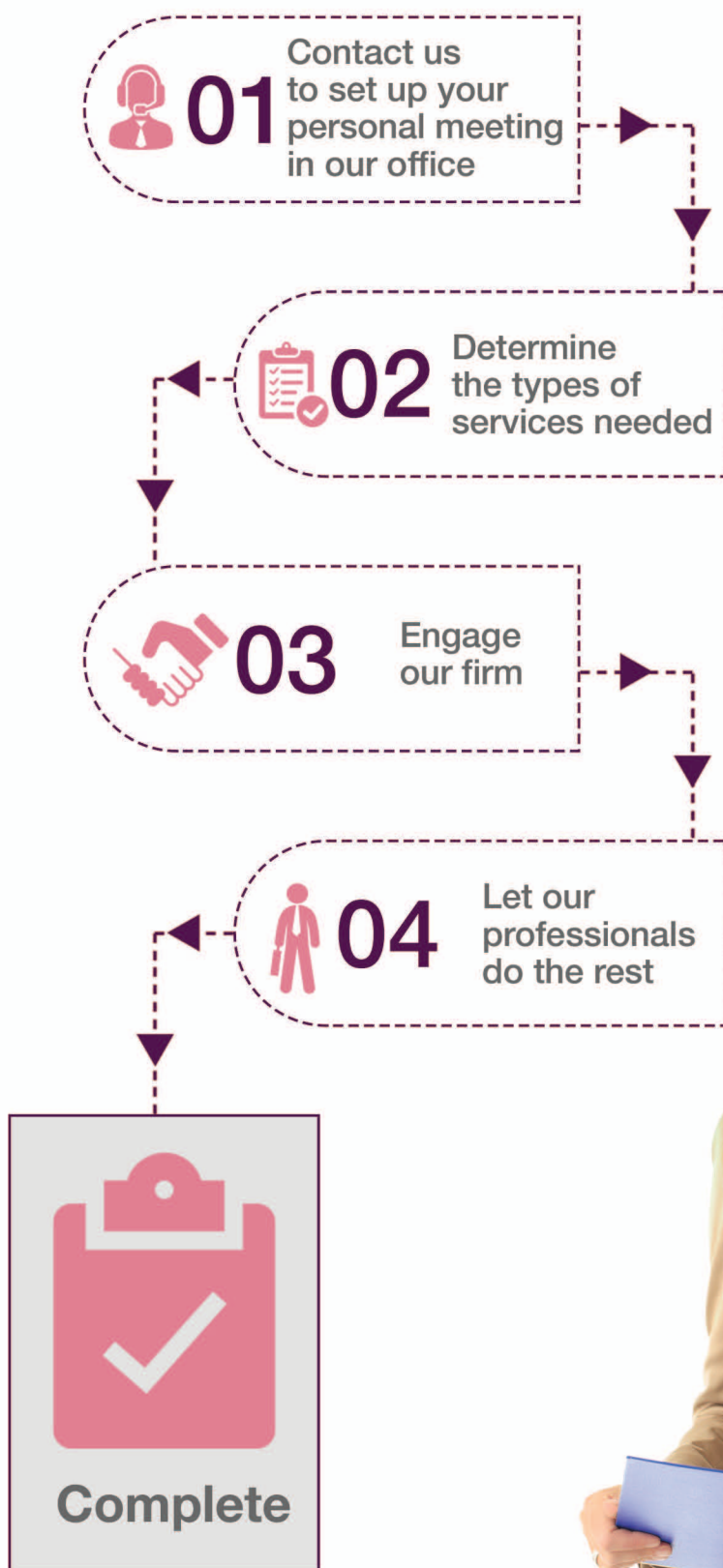
In addition, we offer information and resources that comes directly from the local jurisdictions for ease of use. We provide important, yet straightforward documents such as a "case diary," which gives you a timeline to track key events and dates pertaining to the probate case. We also offer a "resource directory," with resources such as contact information for qualified vendors that can assist you with preparing the real property for sale.

Taking a moment to call us will save you tremendous time going forward. Our comprehensive services will ease your stress and give you the assurance you need to administer the estate.

When you need efficient, compassionate assistance, our team is ready to respond. Call us today, so we can immediately begin to streamline the probate process for you.

We are not lawyers, please consult a licensed attorney


■ COMPLETE LIST OF SERVICES





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■ KEEPING A CASE DIARY TO TRACK KEY DEADLINES


Write Date Here


-  1. Date of death


-  2. Date of filing of will in appropriate court


-  3. Date the court appoints a Personal Representative, also known as Letters of Administration


-  4. Date of notice to creditors in local newspapers


-  5. Date of notice to Interested Persons


-  6. Date to provide all Interest Persons with inventory of assets


-  7. Expiration date for creditors filing claims against the estate with the Personal Representative


-  8. Due dates for decedent's personal tax returns


-  9. Date federal estate tax return due if necessary


-  10. Date of District of Columbia estate tax return due if necessary


-  11. Federal and D.C. estate income tax return due

-  12. Automatic termination of the appointment of unsupervised Personal Representative

-  13. First account due with court in supervised administration cases

-  14. Date of filing later accounts with the court in supervised administration cases

-  15. Date estate is closed

-  16. Date that Certificate of Completion is filed with appropriate court

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01

Locate the Will and file it with appropriate court and secure appointment of the Personal Representative



02

Take a complete inventory of decedent's assets at time of death and have each valued



03

Verify the taxes, debts and settlement expenses of the estate and pay them



04

Allocate the remaining assets to the correct beneficiaries



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■ EFFECTIVE ADVICE FOR PERSONAL REPRESENTATIVES

Following the guidelines below in orders will ensure that you administer the probate process as quickly and easily as possible:

1. Answer each question on every form
2. Provide copies of the inventory and completed accounting to all interested parties
3. Provide the Court with all documents it requests
4. Allocate the assets in accordance with the Will
5. Meet each deadline by keeping a calendar of key events
6. Ensure that all assets are listed correctly
7. File all necessary tax documents for the estate and decedent
8. Keep a comprehensive file on all estate bank statements, cancelled checks and receipts
9. Keep a comprehensive file on estate income, expenses, asset allocations and deposits



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■ CLIENT'S MENU OF PROBATE & TRUST SERVICES

What services do you feel you'll need?

As the leading Probate-Estate experts we offer our clients high quality, efficient, full-service for all probate real estate-related services, which has saved them a tremendous amount of time, frustration and money. Think of Tania Ivey Real Estate Group as your "HUB" for any and everything probate and trust related even if it's for an estate administration, conservatorship, or a guardianship case.

We can help with everything you and your family need; from Estate Sales to Cleanouts and Hauling as well as Real and Personal Property Appraisals to Property Management and so much more while under a listing with Tania Ivey Real Estate Group.

Services Tania Ivey Real Estate Group has to offer ...

In our quest of offering the highest-quality and most efficient service possible for our clients, please review the list and check the appropriate box for the service(s) you feel the estate needs now or in the near future (check all that apply):

- | | | |
|--|--|---|
| <input type="checkbox"/> Cleanout / Hauling | <input type="checkbox"/> Maid-Service | <input type="checkbox"/> Moving/Recycling/Donations |
| <input type="checkbox"/> Estate Sale/Auction | <input type="checkbox"/> Home Staging | <input type="checkbox"/> Appraisal, Personal Property |
| <input type="checkbox"/> Property Management | <input type="checkbox"/> Appraisal, Real Prop | <input type="checkbox"/> CFP/Financial Planner |
| <input type="checkbox"/> Title Attorney | <input type="checkbox"/> Title Company | <input type="checkbox"/> Short Sale ("underwater" sale) |
| <input type="checkbox"/> Probate Attorney | <input type="checkbox"/> Paralegal/Filing Forms | <input type="checkbox"/> CPA Estate Tax Return Filing |
| <input type="checkbox"/> Home Inspection | <input type="checkbox"/> Termite Inspection | <input type="checkbox"/> Roof Inspection |
| <input type="checkbox"/> Repairs/Handyman | <input type="checkbox"/> Drywall Repairs | <input type="checkbox"/> Painting (interior/exterior) |
| <input type="checkbox"/> Electrical (repair/replace) | <input type="checkbox"/> Plumbing (repair/replace) | <input type="checkbox"/> Fence/Gate (repair/replace) |
| <input type="checkbox"/> Roof (repair/replace) | <input type="checkbox"/> Window (repair/replace) | <input type="checkbox"/> Floors (repair/replace) |
| <input type="checkbox"/> Kitchen Renovation | <input type="checkbox"/> Bathroom Renovation | <input type="checkbox"/> Major Remodel |
| <input type="checkbox"/> Foundation (repair/replace) | <input type="checkbox"/> Landscaping | <input type="checkbox"/> Room Addition |
| <input type="checkbox"/> Conventional Loan | <input type="checkbox"/> Refinance | <input type="checkbox"/> Hard Money Loan |
| <input type="checkbox"/> Retail Buyer (market value) | <input type="checkbox"/> Investor Buyer (below market) | <input type="checkbox"/> Other _____ |

Tania Ivey Real Estate Group full service approach has saved our clients massive amounts-of-time, relieved their mounting-stress, and maximized the profits of the estate.

... WHY SETTLE FOR ANYTHING LESS

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ABOUT TANIA IVEY REAL ESTATE

Our company is a multifaceted business that operates with you, the customer, at the forefront of our day-to-day operations. We are well known and respected in the community and our philosophies are based on both honesty and integrity. As a client centered business, you will receive personal service and be backed by a reputable company.

We implement multi-level marketing strategies that benefit our clients with every transaction. Our real estate agents have extensive access to information about the communities in which they deal. This includes, but is not limited to: schools, populations, recreation, entertainment, home values, growth potential and surrounding areas. Many agents live in the areas we serve and therefore can more accurately overcome potential obstacles and focus on the unique needs of our clients.

Our commercial division is well-equipped to provide today's growing number of real estate investors with opportunities for both income and commercial properties.

The real estate market is always changing and as a result, our agents regularly attend training sessions and events to further their knowledge and be sure that they are focusing on current conditions that affect today's buyers and sellers. This type of training is imperative if we are to be successful in obtaining top dollar on home sales. Our goal is to make sure that we satisfy the special needs of all of our clients and at the same time make the process and transactions go as smoothly as possible.



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Servicing Maryland, Virginia & Washington DC • Not intended to solicit currently listed properties.