



Introducing...

The Estate Management Services of the Kurt Rosentreter Wealth Management Team

Losing a loved one can be emotionally devastating.

The financial aftermath can be overwhelming too, often leaving family and friends confused about what needs to be done and when – while wondering if there is money to even pay the funeral bill.

As your family financial advisors, we are here to help.

We are pleased to offer our estate management services to you, our client, to provide expertise on a wide variety of estate issues.

We are experienced and skilled estate planners, tax experts, insurance agents, accountants and family guides familiar with the many aspects of dealing with an estate after death. We stand ready to coach, advise and help the heirs and family by providing comprehensive estate advice all overseen by me, Kurt Rosentreter.

Our estate management services include:

- Assisting in getting terminal and estate tax returns completed by an accountant.
- Assessing the need for probate fees and assistance with lawyers to complete the work.
- Educating children, family and friends involved with the estate on the entire estate process, timing and costs.
- Providing objective advice and education between family members who may not get along.
- Assisting with collecting life insurance policy proceeds.
- Providing guidance on liquidation of major assets such as real estate, vehicles and other valuables.
- Working with the estate executor(s) to complete the day to day work of the estate.
- Recommending an estate lawyer and stay involved with the process as desired or necessary.
- Providing financial planning guidance on estate complexities such as second marriage issues, international assets, illiquid assets such as small businesses, tax reassessments and more.

What do our services cost?

For clients who are part of our “comprehensive CFO” services, the estate management services are provided for the life of our relationship at no additional cost.

This service is not available to clients under any other fee arrangement.

(Note that our research indicates similar estate management services available from a trust company, could cost more than \$50,000).



*Kurt Rosentreter, CA CFP, CLU, TEP, FMA, CIMA, FCSI, CIM
Senior Financial Advisor, Manulife Securities Incorporated
Certified Financial Planner, Manulife Securities Insurance Inc.*

*T : 416.628.5761
TF: 1.866.275.5878*

*F : 416.225.8650
C: 416.988.8900*

*3 Church Street, Suite 302, Toronto, ON M5E 1M2
Kurt.rosentreter@manulifesecurities.ca www.kurtismycfo.com*

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