QUANTUM FINANCIAL PLANNING SERVICES, INC.

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Quantum Financial Planning is dedicated to helping our clients build and manage wealth so that they can feel financially secure, both now and in the future. This commitment to our clients, and their loved ones, continues even in the unfortunate event of loss and bereavement.

As part of Quantum's wealth planning and asset transfer services, we have created a Survivorship Service Program. This program is designed to help reduce stress during difficult times and ensure all matters of estate and wealth are carefully looked after so that remaining assets may continue to benefit loved ones for years to come. Our goal is to help the surviving spouse or family member through each step of the legal transition of ownership.

Below is a list of services we provide. We are here to help answer all questions, whether that be in a time of mourning, or when an individual is interested in preemptively setting up a plan in advance to help direct loved ones in the event of death.

Survivorship Service Program

We can help assist you with:

1. Filling out paperwork to change the registered name on bank accounts, investment accounts, and stock certificates
2. Reregistering the Deed of Title on a house and on all properties
3. Filling out beneficiary claim forms to receive death benefit on:
    a. Life insurance
    b. Retirement accounts
        i. Establishing minimum distributions, if needed
        ii. Rolling over retirement plans to the spouse's IRA or setting up beneficiary IRAs, if needed
4. Government programs – such as survivorship benefits for Social Security
5. Estate planning
    a. In case wills need to be updated, we can recommend an estate planning attorney or work with your current attorney to make sure all assets are protected
    b. We can help determine if beneficiaries on the surviving spouse's life insurance and retirement accounts need to be updated
6. Determining if an estate tax return needs to be completed
7. Employee benefits & veteran benefits
8. Completion of the Survivor's Checklist of items
9. We will also look at completing a new Funeral Planning form for the surviving spouse

These services are provided for a retainer fee of $275.

Funeral Planning Form

To relieve the burden of making decisions and arrangements in the time of need, below are my wishes and information regarding my funeral service:

Full Name____
(First) (Middle) (Last)

Address____

Married_____ Never Married_____ Widowed_____ Divorced_____

Employer____________________________________ Year: Started_____ Retired_____

Birthplace__________________ Date of Birth ___/___/___ SSN _____ - ____ - _____

Ever in the US Armed Forces? Yes_____ No_____ Branch_________________________

Rotary?_____ Kiwanis?_____ Lions?_____ Other?_____

Church Affiliation____

Funeral Home____
Name City State

Cemetery____
Name City State

Location of Wills/Trusts____

Spouse (Maiden Name):______________________

Sons

____

____

Daughters

____

____

Parents_________________________ ______________________________
(Father) (Mother-Maiden Name)

Number: Grandchildren _________ Great Grandchildren ________

THESE ARE MY WISHES CONCERNING MY FUNERAL (please circle):

I. A. That there be no public viewing of the body
   B. That there be a public viewing of the body

II. A. That the service be held in church with the body present
   B. That a memorial service be held in the church sometime after burial or cremation
   C. That the service be held in a funeral home

III. A. That the following hymns or songs will be sung:

____

   B. That the following scriptures be read:

____

   C. That the following clergyman conducts the services:

____

IV. A. That my body be cremated: Yes_____ No_____

   B. If yes, that my ashes be:____

V. That in lieu of flowers family and friends may make contributions to:

____

VI. That the following person is to have final authority concerning my funeral and has the right to change any of the above arrangements, if necessary:

____

VII. Other Special Instructions:

____

____

Signed:___________________________________ Date:_____________________

Survivor's Checklist

EMPLOYEE BENEFITS

1) Contact the employer of the deceased's current and prior employee benefit department(s) immediately and request a listing of death benefits payable and payment instructions.
2) Provide employee benefits department(s) with adequate number of certified death certificates and any other documentation required.

VETERAN'S BENEFITS

1) Inquire in person (local office) as to eligibility
2) Deliver required documentation
    a. Birth certificate
    b. Social Security Number
    c. Death certificate
    d. V.A. records

SAFE DEPOSIT BOX

1) Arrange with executor to inventory contents
2) Determine whether contents, if any, may be removed with receipt

FILING TAX RETURNS

1) Make decision on who is to file appropriate tax returns
    a. US Estate Tax Return – Form 706
    b. Residence State Inheritance Tax Report
    c. Inheritance or Estate Tax Returns for other states where applicable (property holdings)
    d. Fiduciary Income Tax Return
    e. Individual Income Tax Return
    f. Estate Accounting
2) While the probate attorney should review the above returns, an attorney, CPA or a bank trust department may prepare them

SURVIORSHIP ACTIONS

1) Review medical insurance and assure continuity of coverage
2) Review will, trust agreements for any changes that may be appropriate
3) Execute a new power of attorney agreement with a "durable" clause