TOOL 2

Important People & Professional Team

The goal is not to know everyone. It is to know who can answer which question.

ROLE	NAME / COMPANY	PHONE / EMAIL	WHAT THEY HELP WITH
Estate-planning / probate attorney			
CPA / tax professional			
Financial advisor			
Insurance professional			
Real estate broker			
Title / escrow contact			
Primary physician			
Care professional			
Contractor / handyman			
Senior-move / placement professional			
Other trusted advisor			

WHO SHOULD HELP COORDINATE THE OVERALL PROCESS IF SEVERAL PROFESSIONALS BECOME INVOLVED?

NOTES