

AfterlyTM
YOUR ESTATE COMMAND CENTER

The Complete Estate Settlement Guide

Everything Your Family Needs
Before & After a Loved One Passes

Estate Sales

Probate Navigation

Executor Guidance

Legacy Planning

Provided Free by Afterly LLC — St. Petersburg, Florida

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This guide is provided free by Afterly™ to help families navigate every stage of the estate process. For personalized guidance, ask Willow™ at afterly.app.

SECTION 1 — PRE-DEATH PLANNING ESSENTIALS

Planning ahead is the greatest gift you can give your family. This section covers everything to organize before a death occurs.

Pre-Death Planning Checklist

- Create or update your Last Will & Testament with a licensed estate attorney
- Establish a Revocable Living Trust if your estate is complex or over \$500,000
- Designate beneficiaries on all financial accounts, retirement accounts, and insurance policies
- Create a Durable Power of Attorney designating who can act on your behalf
- Create a Healthcare Directive / Living Will with your medical wishes
- Organize all important documents in one secure location (physical and digital)
- Create an asset inventory listing all property, accounts, and valuables
- Designate an executor you trust to carry out your estate wishes
- Inform your executor where to find your will, documents, and account information
- Set up a Legacy Vault on Afterly™ to store digital documents and messages
- Record video or written messages for loved ones via Afterly™ Legacy Vault
- Review and update all beneficiary designations every 3-5 years
- Consider pre-planning your funeral and memorial service preferences
- Organize digital accounts and passwords in a secure location

Willow™ Tip

Ask Willow: "Hey Willow, let's plan my will" and she will guide you through every step of the pre-death planning process at afterly.app

SECTION 2 — IMMEDIATE STEPS AFTER A DEATH

The first 72 hours after a death can be overwhelming. Follow this checklist to ensure nothing is missed.

First 24 Hours

- Obtain official pronouncement of death from a medical professional or coroner
- Contact immediate family members and close friends
- Arrange for care of any dependents or pets
- Secure the deceased's property and residence
- Contact a funeral home to arrange for transportation of the body
- Locate the will and any pre-arranged funeral plans

First Week

- Obtain at least 10-15 certified copies of the Death Certificate
- Notify the Social Security Administration
- Notify the deceased's employer and benefits administrator
- Contact life insurance companies to begin claims process
- Notify banks and financial institutions
- Arrange for someone to collect mail and maintain the property
- Begin identifying and locating all assets
- Consult with a probate attorney about next steps

Afterly™ Note

Afterly provides non-legal information and guidance. For legal representation in probate matters, we connect you with licensed probate attorneys in our professional network.

SECTION 3 — PROBATE NAVIGATION GUIDE

Probate is the legal process of settling a deceased person's estate. This section provides non-legal information to help you understand the process.

What is Probate? Probate is the court-supervised process of authenticating a will, inventorying assets, paying debts, and distributing assets.

How Long Does It Take? Simple estates: 6-12 months. Complex estates: 1-3+ years. Florida offers simplified probate for estates under \$75,000.

What Requires Probate? Assets owned solely by the deceased without a named beneficiary typically require probate. Joint assets, trusts, and life insurance policies may not require probate.

Florida Specifics Florida has two simplified processes: Summary Administration (estates under \$75,000) and Disposition Without Will (estates under \$50,000).

Cost of Probate Typically 3-8% of estate value including attorney fees, court costs, and executor compensation. Florida law sets a maximum fee of 4% for executors.

Probate Process Steps

- File the will with the probate court in the county where the deceased lived
- Petition the court to open probate and appoint an executor/personal representative
- Receive Letters Testamentary from the court (official authority to act)
- Publish a Notice to Creditors in a local newspaper (Florida: 2 weeks)
- Create a complete inventory of all estate assets with valuations
- Pay all valid debts, taxes, and estate expenses
- File the deceased's final income tax return and estate tax return if required
- Distribute remaining assets to beneficiaries per the will or state law
- File a final accounting with the court and close the estate

SECTION 4 — EXECUTOR DUTIES CHECKLIST

As executor, you have a legal and ethical duty to administer the estate properly. This comprehensive checklist covers all your responsibilities.

Legal & Court Duties

- Locate and file the original will with the probate court
- Petition the court to be formally appointed as executor/personal representative
- Obtain Letters Testamentary — your official authority document
- Hire a probate attorney to guide you through the legal process
- Notify all beneficiaries named in the will
- File all required court documents and meet all deadlines
- Keep detailed records of all estate transactions
- File final tax returns and pay any estate taxes owed
- Obtain court approval for final distribution and close the estate

Financial Duties

- Open an estate bank account to manage all estate funds
- Collect all money owed to the estate
- Continue paying ongoing bills (mortgage, utilities, insurance)
- Inventory and appraise all assets (real estate, vehicles, valuables)
- Review and pay valid creditor claims
- Manage and protect estate assets until distribution
- Keep accurate records of all income and expenses

SECTION 5 — ESTATE SALES & LIQUIDATION

Afterly™ has been conducting estate sales and liquidation services since 2023. We manage the entire process so families can focus on healing.

- **Physical Estate Sales** We arrange, plan, and conduct full estate sales at the property. Our team handles setup, pricing, advertising, and more.
- **Online Auctions** Items can be listed on our online auction platform reaching buyers nationally. Higher visibility = better price.
- **Full Liquidation** Complete estate liquidation services including buy-out options for estates that need a fast, clean solution.
- **Appraisal Services** Professional appraisals for estate items including antiques, jewelry, art, and collectibles for insurance and more.
- **Realtor Referrals** We connect estate families with vetted real estate agents who specialize in estate property sales across Florida.
- **Afterly™ Marketplace** Browse and list estate items on our online marketplace connecting buyers and sellers of estate property.
- Get Started** Contact Afterly™ to schedule your estate sale consultation. Visit afterly.app or ask Willow™: "Hey Willow, let's schedule an estate sale."

SECTION 6 — LEGACY VAULT & DIGITAL ASSETS

The Afterly™ Legacy Vault is a secure digital platform for storing important documents, leaving messages for loved ones, and preserving your legacy.

Legacy Vault Features

- Secure document storage — wills, trusts, deeds, insurance policies, financial accounts
- Future message delivery — record video or written messages for loved ones
- Trusted contact management — designate who receives your legacy information
- Asset inventory — organize all assets with descriptions and locations
- Digital account instructions — social media, email, subscriptions
- Medical directive storage — healthcare wishes easily accessible
- Business succession documents for business owners
- Password and account access instructions in encrypted storage

Managing Digital Assets After Death

- Locate all email accounts and social media profiles
- Check for any digital assets with monetary value (crypto, PayPal, Venmo)
- Contact each platform about their legacy/memorialization policies
- Facebook: Request memorialization or account removal
- Google: Use Inactive Account Manager if set up, or submit request
- Apple/iTunes: Request account closure through estate process
- Cancel all streaming subscriptions and recurring digital payments
- Transfer or archive any important digital files and photos

SECTION 7 — PROFESSIONAL REFERRAL GUIDE

Afterly™ connects estate families with vetted professionals across every discipline needed for complete estate settlement.

Professional	When You Need Them	What They Do
Probate Attorney	Immediately after death	Guides the legal probate process, files court documents, ensures proper distribution
Estate Planning Attorney	Before death / for pre-planning	Drafts wills, trusts, powers of attorney, and healthcare directives
CPA / Tax Professional	For final tax returns	Files the deceased's final income tax return and estate tax return if required
Real Estate Agent	When selling estate property	Lists and sells real estate owned by the estate, specializing in estate sales
Appraiser	For valuing estate assets	Provides certified valuations of real estate, jewelry, antiques, art, and vehicles
Financial Advisor	For investment accounts	Helps transfer or liquidate investment accounts, retirement accounts, and annuities
Insurance Agent	For life insurance claims	Assists with filing life insurance claims and reviewing existing policies
Afterly™ Estate Sale	For personal property	Conducts estate sales, online auctions, and liquidation of personal property
Find Professionals	Afterly™ connects you with vetted professionals in our network. Ask Willow: "Hey Willow, I need a probate attorney" and she will connect you with licensed professionals in your area.	

SECTION 8 — GRIEF RESOURCES & SUPPORT

Grief is a natural part of loss. These resources are available to support you and your family through this difficult time.

Resource	Contact	Services
National Alliance for Grieving Children	grieve.org	Support for children and families experiencing grief
Grief Share	griefshare.org	Support groups for people grieving the death of a loved one
Crisis Text Line	Text HOME to 741741	24/7 crisis support via text message
988 Suicide & Crisis Lifeline	Call or text 988	24/7 mental health crisis support
SAMHSA Helpline	1-800-662-4357	Mental health and substance abuse support
American Foundation for Suicide Prevention	afsp.org	Grief support for those who have lost someone to suicide
Afterly™ Willow AI	afterly.app	Estate guidance and emotional support during estate transitions

SECTION 9 — IMPORTANT CONTACTS TEMPLATE

Complete this template and store it in your Afterly™ Legacy Vault so your executor can access critical information immediately.

ATTORNEY		FINANCIAL ADVISOR	
Name:	_____	Name:	_____
Phone:	_____	Phone:	_____
Email:	_____	Email:	_____
CPA / ACCOUNTANT		INSURANCE AGENT	
Name:	_____	Name:	_____
Phone:	_____	Phone:	_____
Email:	_____	Email:	_____
EXECUTOR		BACKUP EXECUTOR	
Name:	_____	Name:	_____
Phone:	_____	Phone:	_____
Email:	_____	Email:	_____
BANK / INSTITUTION		INVESTMENT ACCOUNTS	
Name:	_____	Name:	_____
Account #:	_____	Account #:	_____
Phone:	_____	Phone:	_____

SECTION 10 — AFTERLY™ PLATFORM GUIDE

Afterly™ is the most comprehensive estate platform in existence — combining physical estate sales, digital planning tools, AI guidance, and professional referrals in one place.

■ **Estate Sales & Liquidation** Browse local estate sales, list your sale with Afterly™, or request full liquidation services. Operating since 2023.

■ **Willow™ AI Assistant** Voice-activated AI assistant for estate guidance. "Hey Willow, what do I do first?" Available 24/7 on mobile.

■ **Mobile App** Download the Afterly™ app on iOS, Android, or direct download at afterly.app. Free to download.

■ **Web Platform** Full Afterly™ Estate OS available at afterly.app from any browser. Estate dashboard, asset tracking, and more.

■ **Legacy Vault** Secure digital vault for documents, messages, and legacy preservation. Available in app and web platform.

■ **Professional Network** Vetted attorneys, real estate agents, appraisers, and estate professionals available via referral through Willow™.

Get Started with Afterly™ Today — Free

- ✓ Download the app at afterly.app
- ✓ Ask Willow™ anything about your estate
- ✓ Browse estate sales near you
- ✓ Set up your Legacy Vault for free
- ✓ Connect with estate professionals in your area

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