Sudden Death Checklist for Business Owners and their Families/Employees

This workbook is designed for Estate Planners to “quarterback” a team of professionals in order to facilitate a difficult conversation with their clients: Their Own or Spouse’s Sudden Death.

The workbook is intended to be printed, and not digitalized, to ensure the client has one copy of their private matters, and their intentions are secured by the proper advisor, or is placed in a safe deposit box when needed. The goal is to provide a means to discuss some of the owner’s most difficult topics, in order to provide the family a way to administer the funeral and estate requirements, while coping with their sudden loss and tragedy.

For Estate Planners, the workbook encourages team formation of the client’s most important advisors, which in turn, increases the need for value added services most clients rarely invest their time and money to complete. As the quarterback, you become the team’s leader in organizing the playbook and driving the team to success; thus, winning over the family and generating good will. For Large orders, the workbook can be a Private Label tool to improve marketing and brand awareness

The workbook is broken down into 10 Chapters to help frame the conversations, collect important information, and to help organize the Client’s documents and valuables in a safe and secure way.

Want to learn more? Call Jack Veale at (860) 232-9858