Copeland Wealth Management specializes in helping widows prepare for the future. One of our goals is to provide you with clarity about how our process works. Please take a few minutes to review the steps we will take together and to learn what you will need to gather.

Step 1

[Schedule appointment with Copeland Wealth Management, LLC]

Please plan to bring as many of the following documents and items as you can:

Click the title to learn more

{loadposition content2}

Step 2

We will schedule a meeting with your estate attorney (if necessary, we will help you find one you are comfortable with). At this meeting, your attorney will go over a legal plan of action and a timeline of what needs to be done, including a discussion on probate, debt responsibility, property transfers, and creation of new will, trust, and power-of-attorney documents.

Step 3

We will help contact financial institutions, government agencies, and other involved parties to let them know that your spouse has passed. Each institution will have different procedures for us to complete.

Step 4

Copeland Wealth Management will then help you build your new financial accounts. We will help you properly title accounts in order to avoid the complex legal process known as probate, and to help minimize the tax impact on your estate. We also help you build a detailed financial statement that is the basis of planning for the future. Finally, we will work with you to understand your investment objectives and risk tolerances. Then we will build and manage your investment portfolio to meet your specific goals and objectives.