EXCLUSIVE ESTATE ADMINISTRATION INC.

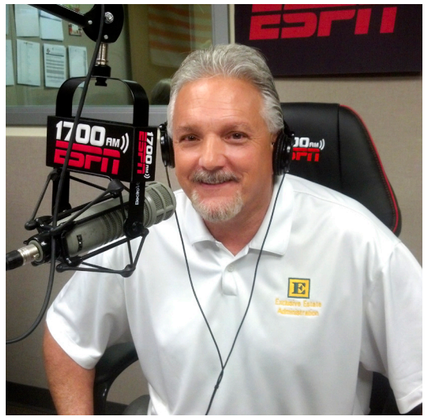
FIDUCIARY AND ESTATE MANAGEMENT SERVICES

www.exclusiveestateadministration.com

WHO WE ARE

MEET THE FOUNDERS

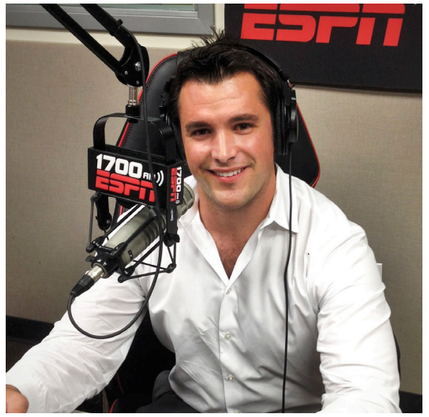
Frank R. Fiorito and Bryan N. Fiorito co-founded Exclusive Estate Administration (EEA) with a passion to ensure that our clients lives are lived to the fullest, and that they receive the care and attention they deserve. “It is our duty to ensure that each of our clients day-to-day decisions are made in accordance with their wishes.” Frank Fiorito, CEO, CLPF #530. EEA is committed to protecting our clients’ finances from financial abuse, and work hard to provide our clients with the peace of mind, and knowledge in knowing their finances are protected.



Frank R. Fiorito, CLPF

Founder, CEO

Frank is a Cal State University alumni, graduating with a degree in Business Administration. He has a background in sales, organization, and estate management; skills that have been developed over the course of his career. Recently, Frank has directed his talents towards assisting victims of financial elder abuse in recovering stolen assets and preventing financial exploitation. An instinctive ability to recognize the characteristics of financial abuse has resulted in recovery of assets for many of his clients. Frank also holds a membership with the San Diego Chamber of Commerce, Ending Financial Elder Abuse Alliance, and the Professional Fiduciary Association of California.



Bryan N. Fiorito, CFO

Co-Founder, Director of Business Development

After attending Occidental College and University of Montana, Bryan graduated from Chapman University System with concentrations in Business Management and Marketing. Bryan’s ability to create innovative solutions for each customer’s individual challenges has led to the creation of new services designed to protect clients from financial exploitation. His strong passion to protect seniors from financial elder abuse has led him to also become the Co-Founder the Ending Financial Elder Abuse Alliance, a team of professionals working together to educate, empower, and motivate elder citizens and all the people who love and serve them to help identify and prevent financial elder abuse.

WHAT WE DO

WHAT IS A FIDUCIARY?

A fiduciary is a person who assumes responsibility for a position of trust. They accept the obligation for taking care of the financial needs and property of another person for the benefit of that person. Fiduciaries can serve as conservator of the estate, personal representative, Trustee and Financial Power of Attorney.

WHAT EEA CAN DO FOR YOU

Our Team of California Licensed Professional Fiduciaries can help you with an array of services from paying your bills and manging mail, to serving as your Professional Trustee and Financial Power of Attorney.

Our experienced team of professionals will administer your estate efficiently, respectfully and according to your wishes.

OUR SERVICES

- Trusted Advisor
- Trust & Estate Administration
- Professional Trustee
- Mail Management & Bill Pay
- Power of Attorney of Finances
- Power of Attorney - Advanced Health Care Directives
- Professional Service Liaison
- Court Appointed Conservator of the Estate and/or the Person
- EEA Estate Coach (Telephone)
- Neutral/3rd Party Trust & Estate Mediation

Who are our clients and how can they benefit?

Young Families

- Ensure your wishes are carried out upon loss of mental capacity.
- Peace of mind in knowing your assets and finances are protected.
- Utilize Preferred Professionals Network of vetted companies to ensure you are working with companies who share our core values.
- Bill Pay and Secure Mail Management Services.

Elder Adults

- Don’t leave your spouse with burden of probate.
- Live with peace of mind knowing that your family will be taken care of should you become incapacitated.
- Have a “Trusted Advisor” that will care about you as if they were a family member, but is neutral 3rd party.
- Maintain your independence and keep your finances private from your family members and beneficiaries.

After Death

- Maintain harmony amongst family members and your beneficiaries with or without involvement of our experienced 3rd party professional trustees.
- Ensure wealth that is passed to beneficiaries is managed properly.
- Remove the burden of the complex administration process from a family member.
- Ensure assets are distributed according to your wishes.

SERVICES

TRUST & ESTATE ADMINISTRATION AND PROFESSIONAL TRUSTEE

Determining who will handle your financial affairs when you are no longer able to do so is an important decision. At EEA, we believe that you deserve nothing but the highest quality of life. With our professional trustees, you will receive a personalized experience customized to you.

We understand that not every client wants the often sterile experience of working with a corporate trustee. Our fiduciaries go above and beyond to ensure you are taken care of in every aspect of your life. This includes coordination of in home care and other professional services such as bill pay & mail management. Even better, we will visit you in the comfort of your home to ensure that someone is checking in on you regularly.

PROFESSIONAL LIAISON

We understand that families are often spread throughout the country and have very different family dynamics and work schedules that may prevent them from being able to make an educated decision on the services their aging parents need. While the "Professional Liaison" service is included in our Power of Attorney and Trustee services, it can be offered as a stand alone service if requested.

"EEA's innovative one-stop-shop approach to fiduciary and estate management services ensures support every step of the way."

FINANCIAL POWER OF ATTORNEY

Our team of licensed fiduciaries are experienced in managing the personal finances of those who no longer have the mental capacity to make decisions on behalf of themselves. We will do anything from coordinating services to making mortgage and bill payments on behalf of the client.

- **Limited POA** · Used for clients who are only using our bill pay services or other limited / "project based" work.
- **Springing POA** · Powers do not become enacted until client is deemed incapacitated.
- **Durable POA** (Financial)
  Registered Nurse or Care Manager (Health)
- **Full POA** · Full powers to act on behalf of client for ALL related financial decisions.

BILL PAY & MAIL MANAGEMENT

Often times as we age, bills and mail become harder to manage. Eventually mail begins to pile up and bills go unpaid. Sometimes this results in utilities or other services being turned off. For a very low monthly cost, ensure your bills are paid on time and your mail is being managed by a professional.

Every year there are thousands of scams targeted towards the 65 and older and mentally handicapped. It is estimated that over $36.5 billion is lost every year to these type of scams. With our monthly mail management service, we are able to protect our clients from unscrupulous charities and "foreign lottery scams".

Types of Trusts
Irrevocable Trust
Revocable Trust
Irrevocable Life Insurance Trust
Special Needs Trust
Ask us about your trust!

TRUSTED ADVISOR

We understand that not every case is the same. Many of our clients have started out using our "Trusted Advisor" service.

We recommend our Trusted Advisor service for those who have appointed a family member or friend as their trustee, and have since lost their mental capacity thus are no longer able to make changes to their estate plan.

Our experienced team of licensed fiduciaries are here to guide your appointed trustee through the estate administration process, offering a step-by-step "do it yourself" (DIY) option for your trust administration.

We recommend Trusts with total assets under $1MM utilize this service, as it is the most cost effective solution.

IS MY FAMILY'S FUTURE PROTECTED?

PARENTS

- Am I becoming a burden to my loved ones?
- Would my family make financial decisions in my best interests?
- Who will handle my estate when I pass away?
- Is there a neutral 3rd party (i.e. Fiduciary) to carry out my wishes?

ADULT CHILDREN

- Is caring for your parents beginning to feel like a burden?
- Is providing for your parents taking away from time with your family?
- Are you juggling too much between your family, parents and career?
- Are you overwhelmed by life in general?

WE CAN HELP SOLVE THESE PROBLEMS

Exclusive Estate Administration ("EEA") is a team of Certified Licensed Professional Fiduciaries that understands family dynamics. Aging parents do not want to burden their children, but they may need assistance in later years. Adult children would like to care for their parents, but they have their own family and career obligations. Balancing all of these priorities can be extremely challenging.

HOW YOU BENEFIT

HOW OUR CLIENTS BENEFIT

No one wants to think about their death or incapacities any sooner than they must, but planning your estate in advance, is the most responsible and caring gift that you can give to your grieving loved ones. There are a number of benefits our clients receive upon hiring us. Meet with one of our Certified Licensed Professional Fiduciaries today to learn how we can help you.

We have a proven track rate of recovering stolen assets, maximizing entitled benefits and managing personal finances, so that you do not have to. Our team works diligently and efficiently to ensure the highest quality of living possible.

Our strong relationships with government agencies, court officials, pre-screened partners and legal professionals has resulted in many satisfied clients and successful outcomes. Our team of experienced professionals are here to provide our clients with the highest level of customer service.

SCHEDULE A FREE CONSULTATION

855-GO-EEA-TODAY (855-463-3286)

FAQ'S

Q: If I engage EEA's services now, will I have to give up my decision making power immediately?

A: No, we cannot perform our services as POA or Trustee unless you have been deemed incapacitated by two or more physicians (ruling document is your health care directive).

Q: I have under $1MM in total assets, can I afford to hire a Certified Licensed Professional Fiduciary?

A: Yes, despite your budget, we will customize our services to meet your unique needs. We have many clients who utilize our Trusted Advisor service to assist them only when completely necessary.

Q: If I regain capacity after I have been deemed "incapacitated", will I be able to resume control of my finances?

A: Yes. It isn't uncommon to see clients regain capacity after they have been deemed incapacitated. If two physicians can state that you have the capacity to manage your finances and you have the desire to resume control, we will make the transition seamless.

"We work hard at EEA to ensure a high quality of living for each of our clients. Many of our clients have worked hard their entire lives to grow their savings and ensure a stress free retirement. We do everything within our power to ensure that their finances are protected and that their legacy is passed on according to their wishes."

–Frank R. Fiorito, CEO

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