EXCLUSIVE ESTATE ADMINISTRATION INC.

FIDUCIARY AND ESTATE MANAGEMENT SERVICES

www.eeadmin.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 their clients lives are lived to the fullest, and that they receive the care and attention they deserve. EEA is committed to providing clients and their families, the comfort in knowing that their loved one is receiving all of the appropriate care and attention.

Our team of professionals 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 Fullerton alumni, graduating with a degree in Business Administration. After receiving his fiduciary license in 2010, Frank founded EEA with his son Bryan.

Frank has directed his focus towards assisting our clients, corresponding with appropriate parties on their behalf, and overseeing his team of fiduciaries and support staff. With over a decade of professional fiduciary experience, Franks has broad range of experience with managing trusts and estates of various sizes. He also holds a membership with the Professional Fiduciary Association of California, and maintains his CLPF license.

Bryan Fiorito

Co-Founder

Bryan focuses on the companies business development, strategic partnerships, and marketing efforts. His primary role with EEA is to establish strong working relationships with local companies and professionals.

In 2010, he co-founded EEA with his father, Frank. His passion for creating business solutions to solve common problems is what inspired him to co-found EEA, an estate management and professional fiduciary company based in Southern California.

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 managing mail, to serving as your Professional Trustee, Financial and Health Care 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?

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.
- Parents with special needs children, and adult dependent children.

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

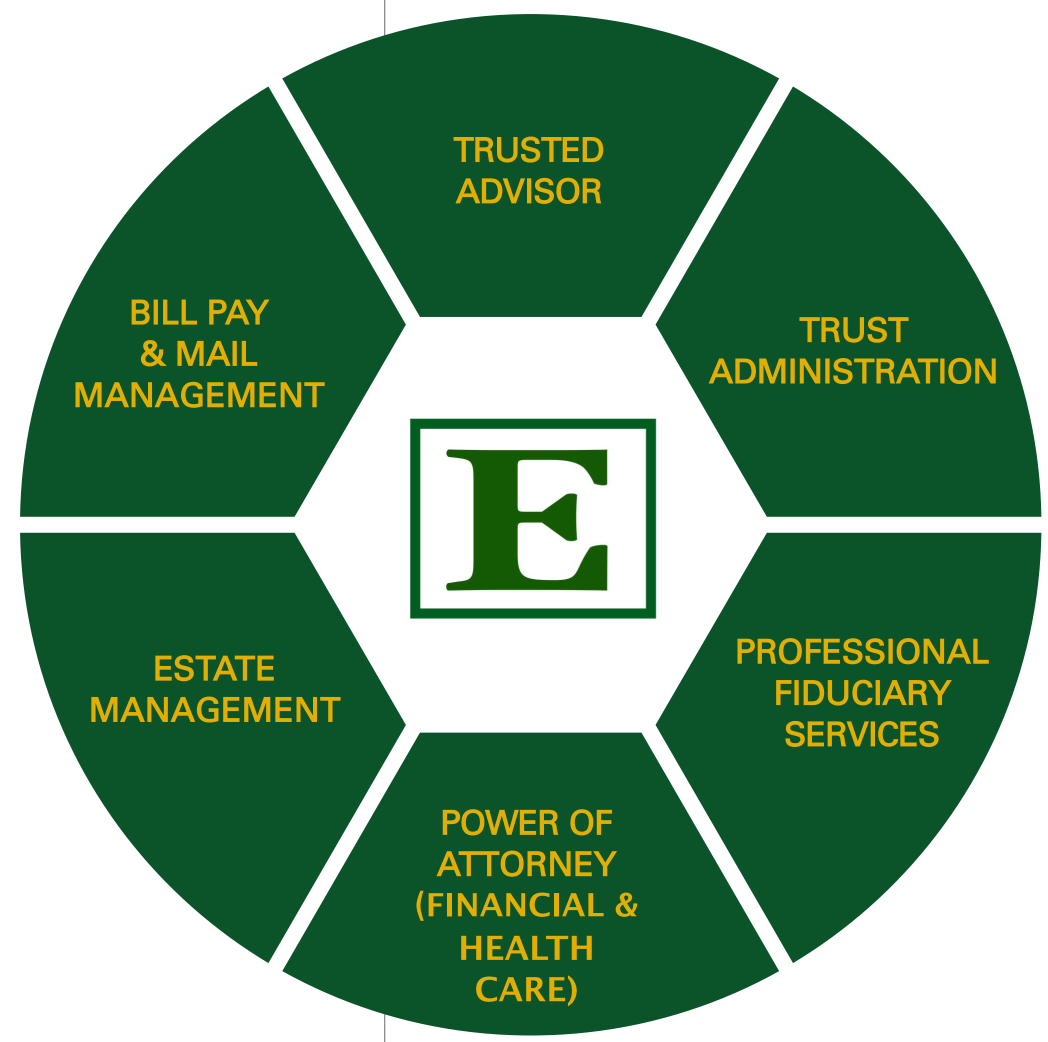
Determining who will handle your financial affairs when you are no longer able to do so is an important decision. At EEA, we believe that you deserve nothing but the highest quality of life. With our professional trustees, you will receive a personalized experience customized to you.

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 "team 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 shut off. For a low monthly cost, you can ensure your bills are paid on time and that your mail is being managed.

Every year there are thousands of scams targeted towards people ages 65 and older. 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 help protect our clients from many of the scams that are regularly targeting them through the mail.

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

Aside from birth, dying is the only other experience we will all share. So why is it so hard to talk about it? And why is it so important that we should? 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 California Licensed Professional Fiduciaries today to learn how we can help you.

We have a proven track record of maximizing entitled benefits and managing personal finances according to our clients wishes. Our team works diligently and efficiently to ensure the highest quality of living possible.

Our strong relationships with organizations and top legal and senior care professionals in the community, has resulted in many satisfied clients and successful outcomes. Our team of experienced professionals are here to provide our clients and their loved ones 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.

A MESSAGE FROM OUR FOUNDER

"It is our mission at EEA to ensure a high quality of living for each of our clients. Most of our clients have worked hard their entire lives to build their savings and have positioned themselves for 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

EXCLUSIVE ESTATE ADMINISTRATION
PREPARE | PREVENT | PROTECT

www.cafiduciaries.com

San Diego Office
11440 West Bernardo Court, Suite 300
San Diego, CA 92127

Office (Mailing Address)
P.O. Box 270707
San Diego, CA 92198

Orange County Office
4299 MacAthur Blvd., Suite 100
Orange County, CA 92660