

Guide for Beneficiaries and Estate Executors Helps Bereaved Family Members and Loved Ones Navigate New Roles

New York City, January 29, 2019 - A supportive, step-by-step guide to handling the multiple financial and legal issues that are triggered by a loved one's death is being released today by the financial education content company Lightbulb Press.

Beneficiaries & Executors: A Financial Guide features to-do lists and insightful suggestions for handling the tasks that fall to family members and partners – everything from closing accounts and canceling memberships to transferring ownership of property and investments – and provides a roadmap for the difficult months after a death.

According to Virginia B. Morris, the lead author of the guide, “A growing problem faced by surviving loved ones is finding and accessing information about financial assets that may only be available online, protected by passwords.” She continued, “One of the reasons we wrote the guide was to provide an impetus for gathering this information while there is still time, and what to do when there isn't.”

The guide, written in collaboration with Modera Wealth Management, the National Association of Personal Financial Advisors (NAPFA), Independence Advisors, and other financial and legal professionals, provides straightforward descriptions of key responsibilities and processes, including:

- The probate process
- How assets are passed to beneficiaries
- The role of executors and trustees
- Filing tax returns

“We saw a great opportunity for developing the guide,” explained Bill Houck, a Wealth Manager at Modera Wealth Management. “Too often we have seen surviving loved ones overwhelmed with the process of sorting out financial affairs. The guide is very helpful to organize in advance and to have an easily accessible framework to follow.”

Financial advisors, lawyers, accountants, and other financial and legal professionals will also find the guide useful as a reference when working with clients and their families.

“Helping a client navigate financially through the loss of a loved one – or plan for their own passing – can be a challenge, even for the most tactful financial advisor,” according to Geoffrey Brown, Chief Executive Officer of the National Association of

Personal Financial Planners (NAPFA). “This guide gives advisors a place to start those very delicate conversations, and walk clients logically through the process.”

Those who will find the guide useful as a resource include spouses and partners, children, and other family members anticipating or recently experiencing the death of a loved one, executors of estates, trustees of living wills, and beneficiaries of a will, trust, or investment accounts.

The Guide is available directly from the publisher at www.lightbulbpress.com and on Amazon.

About Lightbulb Press

Lightbulb Press develops financial education content which is used by financial organizations, non-profits, government agencies, and individuals. The content combines clear language with informative graphics to clarify personal finance, investing, and financial planning topics to help empower people to make smart financial decisions.

About Modera Wealth Management

Modera provides wealth management and portfolio management services to individuals, families, trusts, institutions, and philanthropic organizations. Our team is made up of professionals with extensive experience, depth, and skills in financial planning and investing, including CERTIFIED FINANCIAL PLANNER™ certificants, CFA® Charterholders, tax specialists, and others with advanced degrees and designations. Our broad capabilities allow us to address both fundamental and complex financial situations with clarity and efficiency in a comprehensive yet personalized approach.

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