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Free
Consultation
360-910-1044



Specializing in
Personal Asset
Management
for
Estates and Trusts



John E. Nord, CFP®
Professional Fiduciary
Management Services
360-910-1044
www.nwestatepro.com

*Having an estate
plan is important, but
who is going to carry
out your plan?*



*We specialize
in carrying out
your intentions.*



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Whether you have a will, a trust or no plan at all, settling an estate can be stressful, contentious, complex and time consuming.

Ask anyone who has done it before; it is a lot of work!

- ❖ Grief
- ❖ Emotional stress
- ❖ Family conflicts
- ❖ Out of town Trustee or Personal Representative
- ❖ Unusual or out of state assets

These make the process of settling an estate **challenging**.

When wills and trusts are prepared, family members and friends are often selected as Personal Representatives or Trustees. They loyally accept this responsibility (how could they refuse?) not knowing the challenges and responsibilities that lie ahead.

Fortunately, you have an option.

- ❖ Personal
- ❖ Compassionate
- ❖ Independent
- ❖ Knowledgeable
- ❖ Dedicated
- ❖ Local

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Who is Professional Fiduciary Management Services?



- ❖ An independent, neutral management firm that you can assign as your Personal Representative (executor) or Trustee. By appointing us in your will or trust, you relieve your family and friends of the burdens associated with many aspects of managing your estate.
- ❖ We manage estates and trusts of all sizes. We see that portfolios with special meaning to the trustor are maintained and carried on when appropriate.
- ❖ We work with your attorney, CPAs, planner and other professionals already in place and familiar with your family, estate plan and assets.
- ❖ We can also provide assistance to those who have been named as the Personal Representative or Trustee. We'll help families and individuals work through estate management issues and are involved to a small or great extent based on their needs and desires.
- ❖ Owned and operated by John E. Nord, a CFP® professional since 1991, Professional Fiduciary Management Services is based in Vancouver, Washington. John is a long time resident of Vancouver and is actively engaged in the community through Chamber of Commerce, Guide Dogs for the Blind, Boy Scouts of America and church.