



# How to Successfully File a Claim with a Patient's Estate

Trust, Probate and Estate Strategies Simplified

## Today's Moderator



David Eads, CFP®



VITAL INVESTMENT  
MANAGEMENT

## Today's Presenter



William "Will" Beyers III



# The Probate Process

- General definitions, processes and procedures



# The Personal Representative / Executor

- Their duties
- Typically, the individuals that claims should be provided to



# Providing Notice to the Estate

- Best practices



Description of Services	Charges
ANESTHESIA	\$ 4,724.00
DRUGS	\$ 1,761.60
OFFICE VISIT	\$ 906.00
ICU	\$ 1,056.05
LAB-CHEMISTRY	\$ 165.00
LAB-HEMATOLOGY	\$ 1,523.00
MONITORING	\$ 628.50
MED/SURG OTHER SUPP	\$ 462.00
OCCUP THERAPY	\$ 135.85
MEDICAL RECORD	\$ 7,628
PATHOLOGY	\$ 251.60
	<b>\$ 19,241.60</b>

For this invoice, please contact

# What happens next?

- After you've provided notice to the estate of amounts owed, what you can expect?



# Miscellaneous Estate Planning Strategies

- How they could impact the process





# Question and Answer Period

## Today's Moderator



David Eads, CFP®



VITAL INVESTMENT  
MANAGEMENT

## Today's Presenter



William "Will" Beyers III

