



A GUIDE FOR FAMILIES, TRUSTEES & ADVISORS

Understanding Estate Transition Management

A plain-language overview of what Estate Transition Management does, when to call, and what to expect — for anyone facing a complicated property transition for the first time.

One Call. One Plan. One Point of Coordination.

The management and coordination layer for a complicated property transition.

If you're reading this, chances are you're facing a property situation with a lot of moving pieces — and no single person responsible for coordinating all of them. That's exactly the gap Estate Transition Management (ETM) was built to fill.

ETM isn't a real estate brokerage, a moving company, an estate-sale company, or a contractor. ETM is the coordination layer that connects the people, the property, the vendors, the timelines, and the decisions — and manages the process from first assessment to final resolution.

ETM may be involved whether a property is ultimately retained, occupied, transferred, rented, renovated, vacated, prepared for sale, or sold. We manage the transition itself — not your decision about what ultimately happens to the property.

01

Coordinate

One point of contact between you, your family, your advisors, and every vendor involved.

02

Prepare

Managing the work needed to move the property toward its next chapter — clean-outs, repairs, moving, and more.

03

Protect

Oversight, accountability, and documentation, so nothing falls through the cracks.

WHEN SHOULD YOU CALL ETM?

If any of this sounds familiar, ETM can help.

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- You inherited a house and don't know where to begin.
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- You're serving as trustee or executor, and managing the property has become overwhelming.
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- A parent is moving into senior living, and decades of belongings and property decisions need to be addressed.
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- You're downsizing or relocating and need someone coordinating the entire process.
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- A separation or divorce requires moving, storage, repairs, property preparation, or vendor coordination.
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- Family members live outside the area, and someone needs to oversee the property locally.
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- The property requires multiple vendors, estimates, repairs, cleaning, or clean-out services.
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- You already have an attorney, fiduciary, advisor, or real estate agent — but nobody is managing the property logistics.
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Estate and trust transitions remain a specialty, but they're no longer the whole story. ETM works across trust and estate administration, inherited property, senior transitions, relocation and downsizing, separation and divorce, and other complicated family property situations.

A defined process, from first call to final chapter.

01

Assess

A complimentary initial assessment to understand the property, the circumstances, the stakeholders, the timeline, and the desired outcome.

02

Plan

ETM develops a scope of work, priorities, recommended sequencing, vendor requirements, and a management proposal.

03

Coordinate

ETM coordinates approved vendors, estimates, schedules, property access, and communication across every workstream.

04

Oversee

ETM tracks progress, vendors, open issues, property status, and stakeholder communication throughout.

05

Transition

ETM helps move the residence toward its intended next chapter — retained, occupied, rented, transferred, renovated, sold, or relocated into.

WHAT ETM COORDINATES

A comprehensive scope, managed through a single point of contact.

ETM is the manager and coordinator — not every trade performed personally. Here's what falls under that coordination.

Transition Assessment & Planning Initial walkthrough, scope definition, and a clear plan before work begins.	Property & Vendor Coordination Sourcing, scheduling, and overseeing every vendor involved.
Inherited Property Support Helping heirs assess options and execute next steps.	Trustee & Executor Property Support Managing the property obligations that fall to a fiduciary.
Senior Transition Coordination Coordinating the move from a longtime home into its next chapter.	Relocation & Move Coordination Move planning, mover coordination, and move-day logistics.
Downsizing Coordination Sorting strategy, donation, and disposal coordination.	New Residence Setup Coordinating movers, cleaning, and basic setup at the next home.
Separation & Divorce Transitions Neutral coordination of agreed-upon property tasks.	Personal Property & Estate Sales Coordinating estate sale professionals and disposition.
Clean-Out, Donation & Disposal Overseeing clean-out crews and donation logistics.	Moving & Storage Sourcing and scheduling movers and storage providers.
Repair & Property Preparation Managing contractors ahead of a property's next chapter.	Property Maintenance & Oversight Ongoing oversight for vacant or transitioning properties.
Stakeholder Communication Keeping every family member and advisor informed.	Real Estate Transition Coordination Coordinating with your real estate professional when a sale is part of the plan.

A resource for families — and for the professionals they already trust.

Complex transitions involve a lot of people. ETM works alongside the advisors already in your life — not around them. You're never required to change attorneys, agents, or advisors to work with ETM.

Families & Individuals

One point of contact instead of a dozen decisions and vendors to manage alone.

Trustees & Executors

Relief from the operational burden alongside fiduciary duties.

Professional Fiduciaries

A dependable coordination partner across client properties.

Estate & Trust Attorneys

A resource once legal work intersects with property logistics.

Family Law Attorneys & Mediators

Neutral execution once terms are agreed upon.

Wealth Advisors & CPAs

A way to support clients without taking on operational work.

Seniors & Their Families

Support through a senior transition's practical complexity.

Real Estate Professionals

A partner for complex situations — without competing for the listing.

Out-of-Area Family Members

Local oversight when the family lives elsewhere.

WHAT DOES IT COST?

A clear scope and price, before anything begins.

Every transition is different, so we don't quote a flat number until we understand yours. Here's how it generally breaks down:

A few hundred dollars

Limited-scope services — a single coordination task or short-term project.

From ~\$2,500

Comprehensive transition management, varying with complexity and duration.

Third-party services — movers, estate-sale companies, clean-out services, contractors, storage providers, and other vendors — are quoted separately and approved directly by you. You'll always know what ETM is managing, and what it will cost, before work begins. The initial consultation is complimentary.

NEXT STEPS

There are a lot of moving pieces. ETM knows how to coordinate them.

The best next step is almost always the same: a complimentary assessment. We'll talk through the property, the circumstances, and what a plan could look like — with no cost and no obligation.

Get in Touch

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