

# THE ASHTON ESTATE: CLIENT-DRIVEN SOLUTIONS



Four Decades of Personal Property Cleared, House Repaired, Cleaned and Sold in 81 Days!

**Subject Property:**  
Ashton, MD

“ Dear Andy and Amy,

*I just mailed, what I hope to be, the final information packet for my aunt's estate. We are in the final stretch. On the drive home from the post office, I reflected on that day, seven months ago, when Brad and I found ourselves faced with the responsibility of administering my aunt's estate and the question: "How are we going to do this?"*

*Fortunately, we learned about Trusted Estate Partners. I know we've said it numerous times in between, but we do want to express our appreciation to you both for your understanding, support and expertise as we navigated the duties of estate administration. Throughout the process, you truly were our "trusted estate partners."* ”

## Background

The Estate consisted of a 3,800 sq. ft. rambler filled with 40+ years of belongings, and a vehicle. The personal representative was an out-of-state family member of the decedent. Her interest was to clear the house out, sell what personal effects were salable, and sell the house as quickly as possible, in order to reduce the holding costs -- which they likely would have had to carry through the winter months. The goals seemed simple:

- Sort through all personal belongings
- Determine items of value (get certified appraisal)
- Pack and distribute items to various locations (relatives, auction, charities, disposal)
- Sell the house for the highest price possible within the quickest timeframe possible

## Challenges

The Client and her husband were spending every weekend for *three months* trying to clear out the house. Despite spending all of that time and energy to get things done, they were not making significant progress -- and had become completely *overwhelmed*. At the point they contacted Trusted Estate Partners, these challenges remained:

- Prime selling season coming to an end
- House in good condition but outdated
- Repairs required prior to marketing the house
- Outstanding mortgage on Property



Completed in only 81 days!

## About Trusted Estate Partners

Trusted Estate Partners provides complete estate liquidation services to attorneys, trustees, PRs, and families facing estate settlement, downsizing and other life transitions. From our perspective, the Client experience is what matters most. Because each situation is different, we customize the logistics plan to meet each Client's needs and goals. Not only do we take care of "the house and everything in it," we take care of the Client and what matters most to them.

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*The legal team at Davis, Agnor, Rapaport, Skalny gave me your information ... I want you to know that I've included the following endorsement of your services to them:*

*"I do want to express my appreciation and endorsement for the services of Trusted Estate Partners. I could not have navigated the duties of estate administration without their expertise and support. Andy Spagnolo and Amy Presley are easy to work with and have truly earned the name: trusted estate partners. I would not hesitate to recommend their services and encourage you to suggest their services to your clients." - Val and Brad S.*

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## Logistics

After assessing the situation and needs, Trusted Estate Partners designed a Personalized Plan to meet the Client's goals and timeline. With the Plan in place, Trusted Estate Partners assembled the appropriate alliance team and then supervised the work to ensure completion in accordance with the Plan. Trusted Estate Partners' management of the team and Plan alleviated the Client's "overwhelming feelings and stress."

Trusted Estate Partners' handling of the logistics not only enabled the Client to step away, but also reduced the time to liquidation of the personal property and sale of the house.

## Results

Using their proprietary tools, analytical model, and in-depth market analysis, Trusted Estate Partners evaluated the feasibility of every sale option for the house. Considering the existing mortgage, associated holding costs, waning selling season, and the Client's need to sell quickly, they determined that competitive bidding via the auction sale method would best meet the Client's goals and net the most for the Estate.

Benefits to Client and Estate:

- House was sold in "as-is" condition
- Timing met the Client's needs (*under contract in 42 days from house cleanout*)
- Estate netted more than it could have through standard listing (*no realtor commissions or closing costs paid by Estate*)