



Referral & overflow partner

## Send us the matters you can't economically take.

The small ones. The messy ones. The years-overdue ones with nothing but a box of statements. We turn them into court-ready accountings — flat fee, fast — and hand them back clean. **You keep the client and the relationship; we do the accounting.**

### You keep the client

We do only the accounting and hand it back. We don't practice law, take your matter, or compete for the relationship.

### Flat fee, never blind

We scope the records first, then quote a fixed price — scoped to what's provided, posted rates for anything missing. No open-ended meter.

### Fast — weeks, not months

AI-assisted reconstruction does in hours what hourly work bills for weeks, plus the workpapers behind every number.

### Even the small matters

Hourly firms price modest estates out of reach. Our efficiency finally makes the small, simple ones worth doing right.

### Court-format, CA & FL

California §1061-1063 / GC-400/405 and Florida Fla. Prob. R. 5.346 / §744.3678, principal & income under UFIPA.

### Independent & impartial

A specialist fiduciary-accounting firm — not CPAs, not a law firm. An accounting that holds up when parties disagree.

#### WHAT TO SEND US

- ✓ Small or simple trusts, estates, and conservatorships not worth a senior hourly rate.
- ✓ Years-overdue or unfiled accountings — raw bank, brokerage, and credit-card statements.
- ✓ Commingled accounts, a prior trustee's tangle, or a multi-year catch-up nobody wants.
- ✓ Matters needing a clean, return-ready ledger to hand a CPA or bookkeeper.

#### HOW THE HAND-OFF WORKS

- ✦ **You refer the matter.** Introduce us or send the basics; we set up a secure, encrypted channel for documents.
- ✦ **We scope it free & quote flat.** A one-page scope with a fixed price before anyone commits a dollar.
- ✦ **We deliver court-ready.** Filing-ready accounting + GAAP financials + workpapers. The client stays yours.

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