HeirList

THE PROBLEM

After a loved one passes, the resolution of their affairs covers the entire spectrum of the human experience. Even for those who have done it before, the enormity of the challenge and breadth of areas of expertise is overwhelming, and at a time when most are still grieving. This is a critical problem for society needing to be addressed.

IDRS
INTERNATIONAL DECEASED RESOLUTION STANDARDS

THE CORNERSTONE

The International Deceased Resolution Standards were created to assist in providing structure for this challenge. With close to 1,000 items (to do list) and 100 questions, it is a comprehensive and detailed tool for everyone to better close out the affairs of the deceased.

THE SOLUTION

FREE MOBILE APP

The HeirList mobile application allows one to quickly assess which of the close to 1,000 items of the IDRS applies, and manage & track your progress to their completion.

KNOWLEDGE BASE

The Knowledge Base is a repository of PDF files supporting the mobile application by providing details on all of the questions and 'to do' items, along with how to resolve them.

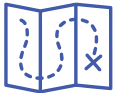# WHAT IS HEIRLIST?

Core Features

Group Exclusion

Application has 100 questions which allow for groups of items to be excluded or included for further review of relevance.

Progress & Status

Overview of completion and status of all of the questions and items, along with percentage completions.

Navigation

A text searching capability and a direct-to-item input option allow a user to quickly find and work on their areas of interest.

Help Resources

The application, along with the HeirList.com website, has over 100 FAQs and dozens of help videos to support usage and resolve issues.

Premium Members

Collaboration

Allows multiple users to work on the same deceased account and divide up the work while having a central workspace and single individual as the coordinator.

User Notes

Users can enter notes into the application for general comments or specific questions and items. Can assign tasks, capture key information or next steps.

Detailed Reports

Comprehensive set of 6 reports containing close to 200 pages of details on all the inputs. Contains status on all questions, items along with date and user who input them.
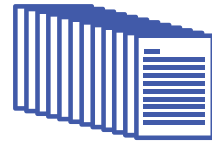
Support

Application based support for user issues to better ensure customer success. Screen based portal to submit questions with human response for resolution.

Knowledge Base

More Than 60 Documents. Over 550 Pages of "What To Do"

Written to Answer . . . .

What exactly is this?
How do I know if it applies?
What do I need to do?
How do I know if I am finished?

For Example

Retirement Plans   Veteran's Benefits
Employer   Children
Funeral   Probate
Assets   The Will
Taxes   Bank
Real Estate   Government

Coming in the future . . .

IDRS Updates
- Add new IDRS items every year

New Countries
- New countries (English speaking to start)

Dates & Priorities
- Dates, timing, reminders and assignments

Enable Voice Notes
- Voice recorded notes to stay inside app

State Sheets
- Details of laws, rules and contacts

Official Religious Guidance
- Protocols directly from religious leaders