Estate Planning **Reference Guide**

Helping Families Protect Their Personal Property Before It Becomes a Problem

Prepared exclusively for
Estate Planning & Probate Professionals

TakeStock®
The Home Inventory Experts

www.takestockinventory.com
844-929-2669

A Letter from Marian Haggar Bryan

Dear Colleague,

Thank you for taking the time to learn more about TakeStock. Throughout my career, I've seen firsthand how personal property often becomes one of the most emotional and time-consuming aspects of settling an estate. While legal documents clearly define a person's wishes, the belongings inside a home often tell a much more personal story—one that can create confusion, delays, and even conflict among family members.
At TakeStock, our mission is simple.

We help families document, organize, and preserve their personal property before those challenges arise.

By creating detailed photographic inventories and organized reports, we provide executors, trustees, attorneys, and families with the information they need to make confident decisions while reducing stress during difficult times.

Our goal is never to replace the important work you do. Instead, we strive to become a trusted resource that helps your clients navigate one of the most overlooked aspects of estate administration.

I appreciate the opportunity to introduce TakeStock and look forward to the possibility of working together.

Warm regards,
Marian Haggar Bryan
Founder & CEO, TakeStock Inventory

Why Personal Property Matters

A home tells the story of a lifetime.

For many families, personal property becomes one of the most difficult parts of settling an estate.

Unlike financial accounts, household belongings often carry **both financial and emotional value**, making them uniquely challenging to organize, value, and distribute.

Without a clear inventory, families often ask:

- What assets are actually in the home?
- What are they worth?
- Who receives sentimental items?
- Has anything been overlooked?
- How should disagreements between heirs be resolved?

Why it Matters

Well-organized documentation provides clarity, reduces uncertainty, and helps families navigate estate administration with greater confidence.

TakeStock helps bring clarity to one of the most personal parts of estate administration.

How TakeStock Helps Families

Every family experiences estate administration differently, but they all benefit from having accurate, organized information. TakeStock provides a secure, structured process that helps families document personal property, collaborate privately, and make informed decisions with confidence.

A Better Experience for Your Clients

Secure Family Portal

Family members can privately review photographs, browse documented assets, and indicate which items they would like to receive—without spreadsheets, emails, or unnecessary conflict.

Estimated Fair Market Values

General value estimates help families better understand the contents of an estate, identify high-value items, and determine when a professional appraisal may be appropriate.

Organized Documentation

Every room is photographed and documented in a consistent, easy-to-understand format, creating a permanent digital record of the home's contents.

Customized Reporting

Whether the client needs an Executor Summary, Heir Allocation Report, Shared Claim Report, or a complete Inventory Report, information can be organized to fit the family's specific needs.

One Secure Location

Photographs, documentation, valuations, heir selections, and reports remain securely stored and accessible whenever they're needed.

The TakeStock Process

From the initial conversation to the final reports, our process is designed to be simple, organized, and stress-free for both your clients and your firm.

Step 1

Discovery & Planning

We begin by understanding the client's goals, timeline, property, and any unique estate considerations to determine the best approach.

Step 2

Home Documentation

Our team photographs and documents the home's contents room by room, creating a complete digital record of personal property.

Step 3

Organization & Valuation

Items are identified, categorized, and assigned estimated fair market values, creating a structured inventory that's easy to understand and navigate.

Step 4

Family Collaboration

Clients receive secure online access where they can review documented items, make private heir selections, and work together through the distribution process.

Step 5

Reports & Ongoing Access

Customized reports and documentation are delivered electronically, providing attorneys, executors, trustees, and families with organized information whenever it's needed.

When to Recommend TakeStock

Personal property often becomes one of the most time consuming and emotional aspects of estate administration. The earlier it's addressed, the smoother the process becomes.

Consider recommending TakeStock when your clients are:

Creating or updating an estate plan	**Navigating blended family or complex heir dynamics**
Preparing for probate	**Protecting valuable collections or high-value assets**
Serving as an executor or trustee	**Managing multiple residences or vacation homes**
Managing the distribution of personal property	**Planning ahead for incapacity or future care**

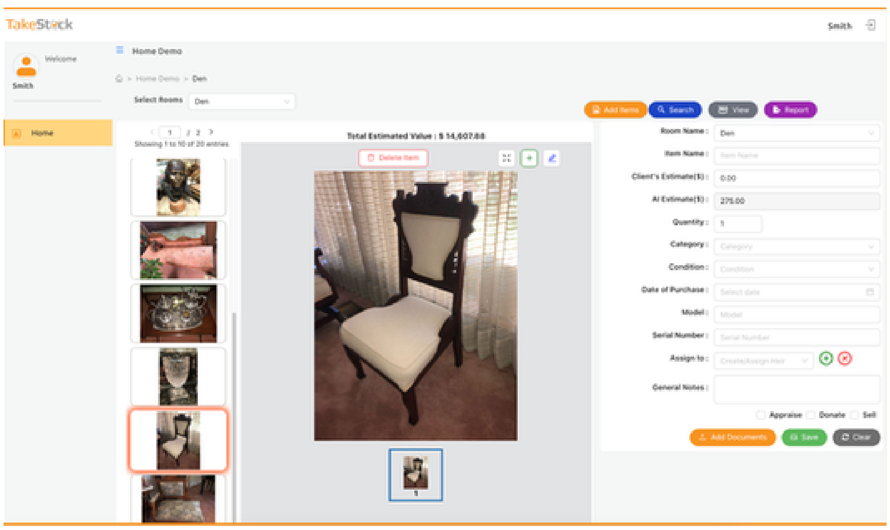
A Simple Rule

If personal property is likely to become part of the conversation, it's time to involve TakeStock. Early documentation reduces uncertainty, improves communication, and helps families make informed decisions.

The TakeStock Portal

A secure workspace where families can review documented property, make private selections, and support an organized distribution process.

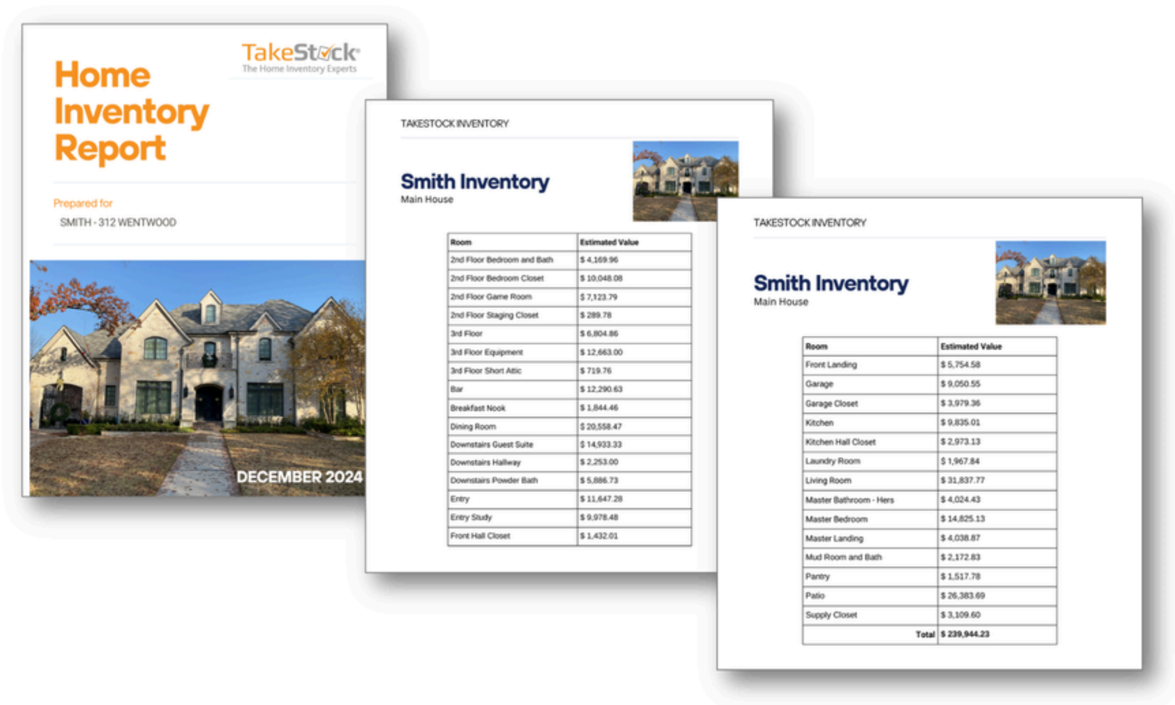
Secure Access from Any Location



Private Heir Selections, Item Details & Estimated Values

Reports That Document the Estate

TakeStock transforms the contents of a home into organized, usable documentation. Reports can provide a complete view of the estate or summarize values by property and room.



TakeStock
The Home Inventory Experts

Home Inventory Report

Prepared for
SMITH - 312 WENTWOOD

DECEMBER 2024

TAKESTOCK INVENTORY

Smith Inventory
Main House

Room	Estimated Value
2nd Floor Bedroom and Bath	$ 4,169.96
2nd Floor Bedroom Closet	$ 10,048.08
2nd Floor Game Room	$ 7,123.79
2nd Floor Staging Closet	$ 289.78
3rd Floor	$ 6,804.86
3rd Floor Equipment	$ 12,663.00
3rd Floor Short Attic	$ 719.76
Bar	$ 12,290.63
Breakfast Nook	$ 1,844.46
Dining Room	$ 20,558.47
Downstairs Guest Suite	$ 14,933.33
Downstairs Hallway	$ 2,253.00
Downstairs Powder Bath	$ 5,886.73
Entry	$ 11,647.28
Entry Study	$ 9,978.48
Front Hall Closet	$ 1,432.01

TAKESTOCK INVENTORY

Smith Inventory
Main House

Room	Estimated Value
Front Landing	$ 5,754.58
Garage	$ 9,050.55
Garage Closet	$ 3,979.36
Kitchen	$ 9,835.01
Kitchen Hall Closet	$ 2,973.13
Laundry Room	$ 1,967.84
Living Room	$ 31,837.77
Master Bathroom - Hers	$ 4,024.43
Master Bedroom	$ 14,825.13
Master Landing	$ 4,038.87
Mud Room and Bath	$ 2,172.83
Pantry	$ 1,517.78
Patio	$ 26,383.69
Supply Closet	$ 3,109.60
Total	$ 239,944.23

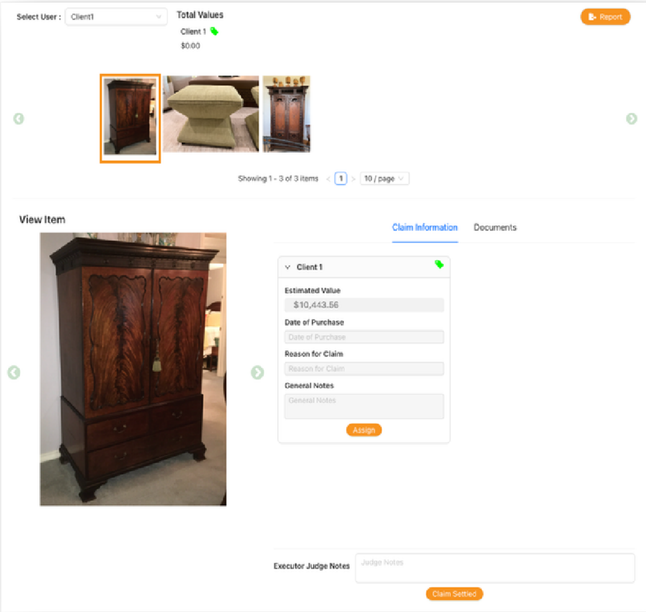
COMPLETE INVENTORY REPORT

A detailed, room-by-room record of documented personal property, including photographs, item descriptions, categories, and estimated fair market values. Summary pages help the executor quickly understand values by property and room.

Organized • Searchable • Photo-driven • Available electronically

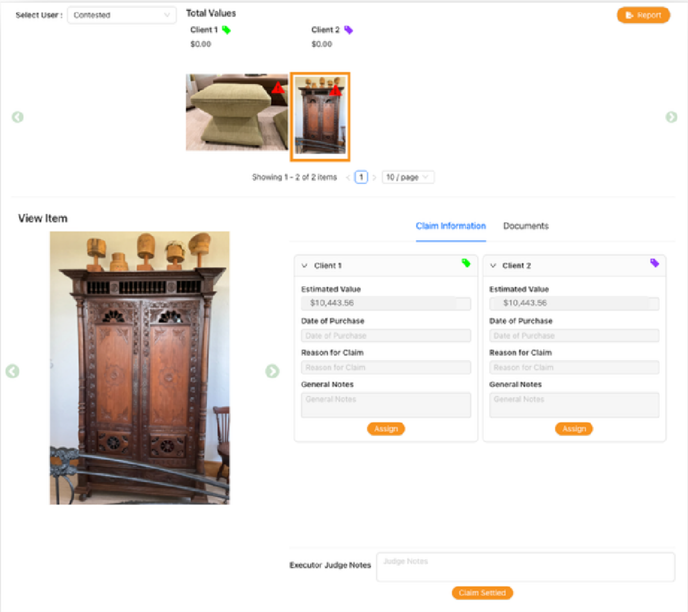
Tools That Support Distribution

Family members can privately indicate which items they would like to receive. TakeStock then gives the executor a clear way to review individual requests, resolve shared claims, assign items, and produce final reports.



HEIR SELECTIONS

Review the items requested by an individual family member and assign resolved items with a clear digital record.



SHARED CLAIMS

Identify items requested by more than one person, record the executor's decision, and mark each claim as settled.

A CLEARER PATH FORWARD

See what has been claimed, what has been assigned, where multiple requests exist, and which items still require a decision.

Frequently Asked Questions

Do you provide certified appraisals?
No. TakeStock provides organized documentation and estimated fair market values. When a certified appraisal is needed, we can help identify which items should be professionally evaluated.

How long does a typical project take?
Every home is different. Timing depends on the size of the property, the quantity of personal belongings, and the level of reporting requested.

When should a client schedule?
The earlier, the better. Completing documentation before it becomes urgently needed provides the greatest benefit to families, executors, and advisors.

Can reports be customized?
Yes. Reports are tailored to each family's needs and may include executor summaries, heir allocation reports, shared claim reports, valuation summaries, and complete inventories.

Do you travel?
Yes. We proudly serve clients throughout Texas and are available for projects in other locations. Please contact us to discuss your specific needs.

Still Have Questions?
We're always happy to discuss a specific client situation before a referral is made.

Meet the Team

TakeStock integrates personalized service, innovative technology, and a streamlined field process to assist families in documenting and managing their personal property.

Marian Haggar Bryan

Founder & CEO

Marian founded TakeStock after recognizing how often personal property is overlooked in estate planning and how difficult it can become for families later. She leads the company's client relationships and strategic partnerships with a practical understanding of the challenges families and professionals face.

Michael Tacker

Chief Operating Officer

Michael oversees TakeStock's operations, technology, reporting systems, and service delivery. He works closely with the TakeStock team and its professional partners to ensure each inventory is completed accurately, securely, and in a format clients can use with confidence.

Together, Marian and Michael help estate-planning professionals give clients a more organized approach to personal property.

Let's Work Together

You do not need to know exactly which TakeStock service a client needs before contacting us.

If personal property may become part of the estate-planning or administration conversation, we are happy to discuss the situation and recommend an appropriate next step.

REFER A CLIENT OR DISCUSS A SITUATION
Phone
844-929-2669

Email
info@takestockinventory.com

Website
www.takestockinventory.com

You remain focused on legal guidance. We help organize the personal property that can become one of the most time-consuming and emotional parts of the estate.
Preserving Memories. Protecting Assets.