

ESTATE & TRUST ADMINISTRATION RESOURCES

Below are some resources that may be beneficial to you to implement some of various processes in the Estate and Trust Administration process.

PROBATE PARALEGAL SERVICE

Below are some resources for potential contract paralegal services that can help support your probate and/or trust and estate administration processes.

CALIFORNIA PROBATE PARALEGAL

Marti Gerardi
Phone: (310) 221-0776
www.MGProbate.com
marti@MGProbate.com

(NOTE: Marti has worked with Phil's law firm for over 30 years. Be sure to let Marti know that we referred you so that she can get you the special pricing that Phil has arranged!)

CONTRACT PARALEGAL SERVICES

Julia Taylor, CEO
LevLegal
jat@lev-legal.com

Del.Trust Legal Staffing Solutions
Jaclyn Foster, Founder
jaclyn@jf-paralegalservices.com

VIRTUAL ASSISTANTS

If you're short-handed on administrative support staff, outsourcing some of this help to virtual assistants can be a fantastic way to increase your capacity. Below are some services where you can find affordable support staff options.

[Traba Legal by Attorneys Matthew Crider & Edward Cainglit](#)

[Philippine Offshoring Job Website](#)

BINDERS & TABS

While we source our binders and tabs locally, we recommend the services of:

Michael A. Salkind
In-A-Bind, Inc
1-800-726-3687
www.inabindinc.com

SOFTWARE

Below are some software resources that may be of help to your firm in the Estate and Trust Administration process.

FORM 706

[GEM706 by Gillett Publishing](#)
[Thompson Reuters 706 Estate Tax Software](#)

COMPREHENSIVE SOFTWARE

[6-IN-1 ESTATE & TRUST ADMINISTRATION SOFTWARE by Lackner Group](#)
[WEALTH TRACX® by WealthCounsel](#)
[Estateably](#)

WEBSITE & INTERNET MARKETING

We highly recommend the services of Foster Web Marketing for your website and internet-based marketing, including social media management, online reputation management, and pay-per-click (PPC) advertising.

[Free Website Analysis by Foster Web Marketing](#)