

opsdog

WORKFLOW

OPMN 2.0 FORMAT

INVESTMENT/ASSET MANAGEMENT

Estate Administration

The OpsDog Financial Services Hierarchy

- Investment/Asset Management
 - Equities Research
 - Portfolio Installation
 - Trade/Transaction Support
 - Retirement Services
 - Mutual Funds
 - Real Estate Investment Trust (REIT)
 - Accounting & Reporting
- Client Services
 - Estate Administration
- Distribution

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Estate Administration: Workflow

- A Executor Planning
- B Estate Distribution

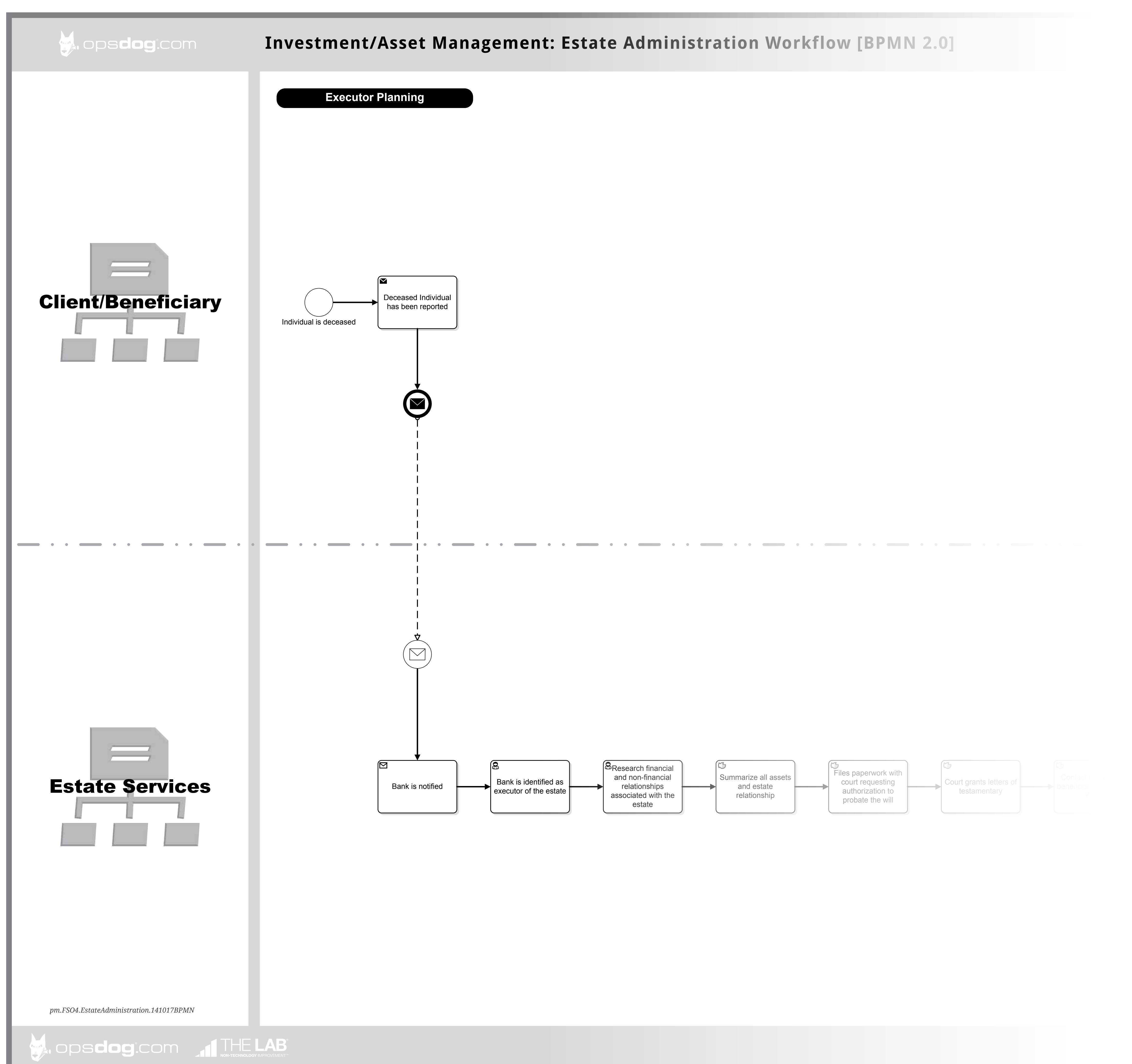
Workflow Description

The execution and disbursement of a deceased individual's existing estate under an investment banking account. Includes initial notification, total estate estimation, beneficiary assignment, final approval and estate distribution.

Legend

- Start Event
- Intermediate Event
- End Event
- Gateway
- Group
- Task
- Expanded Sub-Process
- Pool
- Sequence Flow
- Message Flow

DO-IT-YOURSELF BUSINESS PROCESS IMPROVEMENT



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