REFERRAL PACKET — ESTATE & PROBATE ATTORNEYS

Attorney Referral Packet

Operational coordination for estate and probate matters. Holding Ground handles the administrative weight—notifications, account closures, asset inventory, and family communication—so your firm can focus on the legal work that only attorneys can do.

CO-BRANDING

Your Practice / Firm / Funeral Home Logo Here

Request a co-branded version at support@weholdground.com

Who We Are

Holding Ground is a bonded, insured operational coordination practice supporting executors and families through the administrative weeks and months following a death. We do not provide legal advice. We work alongside your firm—taking direction from the attorney of record on scope and sequencing, and surfacing anything that requires your input early rather than late.

Why This Packet Exists

This document is built to live in your estate & probate attorneys workflow. It explains who Holding Ground is, what we do (and don't do), how a referral works, and how families experience the handoff. Use it internally, share it with colleagues, or hand it directly to a family. Co-branded versions are available on request.

Scope

What Holding Ground Handles — And What We Don't.

WHAT WE HANDLE	WHAT WE DO NOT HANDLE
• Death certificate distribution coordination • Notifications to Social Security, pensions, and benefit administrators • Bank, brokerage, and credit account closure logistics • Subscription, utility, and recurring service cancellations • Insurance claim coordination and follow-through • Asset and liability inventory organized for attorney review • Document collection on the executor's behalf • Weekly executor status reports and a final completion report	• Legal advice or interpretation of estate documents • Court filings, petitions, or probate document drafting • Tax preparation or accounting opinions • Fiduciary decision-making of any kind • Asset valuation requiring a licensed appraiser • Anything that crosses into a regulated professional's scope

Problems We Reduce For Your Practice

OPERATIONAL RELIEF

- Non-billable hours fielding executor questions about institutional logistics
- Disorganized asset inventories that delay accountings and tax filings
- Family overwhelm slowing document collection and signature turnaround
- Repeated follow-up to chase date-of-death values from banks and brokerages
- Pressure to recommend non-legal helpers (form services, organizers, advocates)
- Reputational exposure when a family flounders between matter milestones

We are administrators, not attorneys, accountants, or fiduciaries. The professional decisions stay with you. We operate under written confidentiality protocols and a fixed scope-of-work that explicitly preserves your relationship with the family.

Referral Workflow

A Predictable Handoff—For You And The Family.

01	02	03	04	05
Intake	**Triage**	**Coordination**	**Tracking**	**Resolution**
You introduce the family. They complete a brief confidential intake on their own timeline.	Within 48 hours we map urgent items, confirm scope with you, and align with your matter plan.	We execute notifications, closures, and document collection on the executor's behalf.	Weekly reports to the executor and a parallel summary available to your firm.	Final completion report delivered to the executor and copied to your file.

Trust & Standards

TRUST INDICATORS

- Bonded and liability-insured coordinators
- Written confidentiality and scope-of-work protocols
- Mutual NDA available for the firm relationship
- Documented audit trail of every action taken
- No commission, kickback, or referral fee arrangements
- Direct attorney contact line for matter-specific questions

Fees & Engagement

Holding Ground engagements are fixed-fee and paid by the family or estate, scoped at intake. We share our standard fee structure with referring firms on request and can co-design scope tiers to align with your matter pricing. We do not pay or accept referral fees.

Collaboration Models & Family Scripts.

Per-Matter Referral

You introduce Holding Ground on individual matters. We engage directly with the executor under a fixed-fee scope, coordinated with your firm's matter plan.

Preferred Operational Partner

Holding Ground is named in your client onboarding materials as the firm's preferred administrative coordination partner, with a defined working cadence.

White-Glove Estate Concierge

For high-net-worth or multi-state matters, Holding Ground operates as a dedicated coordination layer with weekly attorney syncs and milestone reporting.

Sample Family Introduction Scripts

> *“There's a fair amount of administrative work that comes with closing an estate—notifying Social Security, closing accounts, organizing documents. We work with a coordination practice called Holding Ground who handles that operational layer for our clients. They're bonded, insured, and they don't give legal advice—they just take the logistical weight off you and report back to me as we move through the matter.”*
>
> *“If it would be helpful, I can put you in touch with Holding Ground. They'll book a confidential intake call, build a plan, and coordinate directly with our office on anything that touches the legal work.”*

Common Questions From Partners

Will you give my client legal advice?

No. We are administrative coordinators. We escalate any question outside our scope back to the attorney of record.

How do you protect privileged information?

Encrypted systems, role-based access, and signed coordinator confidentiality agreements. We can execute a mutual NDA with your firm.

Can you work with families outside our state?

Yes. Our coordination is administrative and largely remote. We support families globally.

How quickly can you onboard a referred family?

We typically complete intake within 48 hours of family contact and provide a triage summary within five business days.

Start A Partnership Conversation

support@weholdground.com · 705-955-1977 · weholdground.com/partners