



*Creating Effective Solutions That Lead to Gracious Living*

### *Private Service Staffing*

Through Peter's exclusive relationship with Precise Home Management, we offer complete staffing solutions for your Home or Estate. Placement services start with a site visit and property walk with the Principal. Once an engagement letter is signed and our retainer fee of \$1500 is received, we begin our exhaustive search for the perfect person for your home. Qualified candidates will be presented with a short synopsis of our conversation with them. Prior to an in-person interview, an open-source background check will be done on the candidate to ensure the safety of you and your home. Once a candidate is chosen and an offer letter is accepted by both parties, we begin reference check and our background screening process, which includes a Behavior Analysis Interview.



### *Fractional Estate Management*

Fractional Estate Management simply means providing the services relevant to your needs and lifestyle without the need to commit to a full-time employee. Tasks such as staff and vendor management, special project management, construction representation, and emergency response are a few tasks EMS expertly manages. We can also be on hand to handle urgent responses to your secondary property or rental homes, or simply mind your home while you are away.

Fractional Estate Management can be custom-tailored to fit your needs with set fees for an established workweek. From there, we can grow or adjust our contract as needs develop or change, with agreements available in increments of three, six, nine or twelve-month periods. EMS can also accommodate payment at an agreed-upon hourly-rate with the minimum term of two hours.



### *Private Service Training*

Offering a variety of training classes, Estate Management Solutions classes focus on the administrative aspects of running a large home that include all templates needed to create a Household Manual. We also offer customizable housekeeping, table setting, and silver service. We also assist the private service professionals to comprehend the non-tangibles and develop the correct mindset to optimally take care of all of your needs, without crossing the delicate personal boundaries.

## *Task Sheets & Check Lists*

Estate Management Solutions capably develops task sheets and checklists designed to provide your staff with expectations for their responsibilities along with proper direction to perform specified duties. This also assists in helping our clients understand many of their staff processes and establishes methods of expected communications between employers and employees. Task sheets include a description of tasks to be performed, agreed-upon timeframes in which the work is to be completed, along with any tools needed to perform the job safely and to expected standards.

In addition to developing task sheets, EMS will work with clients to produce any needed checklists that can be assembled to address daily, weekly, monthly, seasonal or annual tasks designed to help keep staff on task and assure our client's high degree of confidence that their expectations are being exceeded.



## *How-To Documents*

From time to time, every household experiences unscheduled events that vary in degrees from small nuisances to major crises. Some examples are: safely relighting a pilot light on a fireplace or furnace, shutting off the water at the main valve in event of an emergency or resetting smart home technology. Estate Management Solutions is capable of developing, "How To" documents containing photos with step-by-step instructions safely guiding you or your staff through the processes to address and correct any issues before they become big problems.

Pricing to create documents varies with the complexity and may require a site plan or other information related to the home or structure as needed.



## *Principal Preference Profiles*

This is how Estate Management Solutions mindfully and efficiently addresses the personal preferences of each of our clients or principals. We work diligently with our principal to understand and record personal preferences spanning many topics important to delivering the comfort and confidence expected in managing an estate. The creation of a profile eliminates the repetition of having to explain the principal's personal preferences to each staff member and provide continuity of service between multiple service environments. Profiles can be created for every member of the family, including those with four legs and fur.

"We envision service as being the act of giving, in which one's own ego and preconceptions are set aside for the preferences of the Principal" - Peter