January 2023

PROBATE FINDER ondemand®

MEET THE TEAM


Sara J. Brown

Senior Product Manager

Committed to maximizing recoveries for our clients. Sara works as an expert advisor within the Probate Finder OnDemand application product. Sara's team strives to ensure a smooth transition from the onboarding and implementation process to maintaining positive and valued customer relations. **Fun Fact:** Sara once worked in construction and drove a compaction roller.


Kent T. Campos

Executive Account Manager

Kent has enjoyed the last 15 years of his professional career in the collections Industry. Kent now manages the Implementations and manages the onboarding of Probate Finder OnDemand clients. He utilizes his experience to help develop estate recovery strategies. **Fun Fact:** Kent enjoys competitive games and owns over 100 different board games.


Rebecca Anderson

Account Manager

Becca has nearly a decade of probate industry experience, with extensive knowledge in the claim-filing process.Becca has since moved to the front line of Probate Finder OnDemand where she helps support Contact Support for clients in various industries.
Fun Fact: Becca has a 17 month old Australian Shephard mix named Nova.


Matthew Rehnelt

Executive Account Manager

With nearly a decade with Probate Finder OnDemad, Matthew has worked with more than 100 organizations across many verticals including: financial services, healthcare and credit unions. **Fun Fact:** Matt is an expert pit-master but primarily cooks for 2 vegetarians.

REFERRAL PROGRAMS FOR EXISTING CLIENTS

- Referrer receives a $100 billing credit for completion of a Probate Finder OnDemand demo meeting with client's referral.
- Referrer receives an additional billing credit if a qualified referral completes implementation (specific credit will vary and is assigned based on Sales/AM discretion. Average credit anticipated is $250).

Q1 FAQs

1. **Question:** What are the next steps once a claim is paid?
   Answer: We recommend, as a best practice, to use the "Settled" action from the Filed workflow. Using this action will allow you to track recoveries via the application. Additionally, this action generates a Satisfaction and Release of claim form that your office can print, sign and mail to the party who resolved the claim.
2. **Question:** What happens when I receive probate info in our office?
   Answer: If you receive probate case information, via a Notice to Creditors, you should upload it directly to the account in the application using the Document section of the Account Details. If you did not receive a formal notice to creditors, you can send the county, state and case number to our team via our Contact Support tool. Our team will review to verify and complete the case information. This process ensures we expedite an estate match.
3. **Question:** How often is Probate Finder OnDemand checking for new dates of death and probate matches to my accounts?
   Answer: New records are constantly being updated in our database. Our clients receive daily scrubs for both dates of death and probate matches to every account in their respective queues. Once a match is identified, the account will automatically move to its new workflow. This helps segment and organize their entire deceased process. For this reason, it is recommended, any account with a balance owed is uploaded. We encourage all accounts, not just known deceased accounts, be included. Additionally, the best practice is to scrub accounts for 18 – 24 months as it takes time for probated estates to open (only 68% are opened by month 4).

UPCOMING WEBINARS

Probate Best Practices to Maximize Recoveries for Auto Lenders

Date: January 17, 2023 Time: 10:00 AM - 11:00 PM CST

An Inside Look at Probate Finder OnDemand

Date: February 21, 2023 Time: 10:00 AM - 11:00 PM CST

5 Steps to a High-Performance Estate Recoveries Process

Date: March 21, 2023 Time: 10:00 AM - 11:00 PM CST

dcm services