

Estate Planning Process

Step 1

Questionnaire

- › Questionnaire mailed, emailed, or downloaded from our website.
- › Completed questionnaire return to office via mail, e-mail, or fax.

Step 2

Initial Consultation

- › Discuss estate planning goals, concerns, and wishes.
- › Attorney develops and recommends appropriate estate plan to meet client's goals.
- › Engagement agreement prepared and signed by attorney and client.
- › Signing meeting scheduled in 1 month to execute an estate plan.

Step 3

Plan Creation

- › Estate plan drafted.
- › Synopsis of estate plan provided to client via mail or e-mail for review and approval.
- › Signing meeting confirmed and estate plan printed .

Step 4

Plan Execution

- › Meet to review the printed estate plan.
- › Execute the estate plan in front of witnesses, if applicable
- › Executed estate plan scanned, digital file saved, and provided to client.
- › Finalized estate plan binder provided to client with closing and storage instructions.
- › Client follows Funding Instructions to transfer assets into Trust to avoid probate, if applicable