



Introduction to the Estate Planning Process

Our commitment to educating our clients means that each and every client is provided with individualized attention over several meetings designed to:

- 1) Introduce clients to the Estate Plan concept, helping them understand why they may, or may not, need an Estate Plan;
- 2) Obtain information needed to prepare a complete and cohesive Estate Plan designed to meet the client's specific needs, objectives, and concerns;
- 3) Educate clients with the provisions contained in their documents by reviewing the draft version of the Estate Plan documents with the clients prior to the documents being signed and notarized; and
- 4) Impress on clients the need to transfer assets into their Trust because an improperly funded Trust does not accomplish one of its primary goals – Probate Avoidance.

The Typical Estate Planning Process with our Firm:

Introductory Meeting *(Approx 0.5 hrs)*

Usually a complimentary teleconference to discuss the client's needs and objectives.

Planning Meeting *(Approx 1.5 hrs)*

Usually a meeting or teleconference to discuss in more detail the goals to be accomplished. Costs are discussed. If client is married both spouses must attend this meeting.

Should client choose to move forward they are provided with a Retainer Agreement which formalizes the attorney-client relationship.

Draft Review Meeting *(Approx 2.0 hrs)*

(1 to 2 weeks after Planning Meeting)

Meeting with attorney to review draft version of estate plan documents. Client retains hard copy of draft documents. If client is married both spouses must attend this meeting. Although this will waive the attorney-client privilege, persons designated as Successor Trustees, client's CPA, and/or client's CFP are encouraged to attend this meeting if client so chooses. Because numerous documents are reviewed in detail, please allow up to 2 hours for this meeting.

Signing & Funding Meeting *(Approx 1.5 hrs)*

(1 to 2 weeks after Draft Meeting)

Meeting to sign and execute final legal documents in presence of attorney and notary. Trust funding is discussed in detail and Deeds are notarized. If client is married both spouses must attend this meeting. Client retains original signed documents and is typically provided with a thumb drive containing PDF images of their estate plan documents for their records.