

ESTATE PLANNING PROCESS

PRE-CONSULTATION

At this stage, the client and attorney begin to identify initial goals and concerns. The client completes the Estate Planning Deficiencies Check-Up and the Design Questionnaire, which includes contact information and a summary of the client's financial affairs. If client chooses, a referring advisor can provide financial and other relevant background information about the clients' situation and needs.

INITIAL CONSULTATION

We will discuss in detail the clients' background and family, goals and concerns, and any issues identified in the Design Questionnaire that require further consideration. At the end of this meeting, a fee range will be quoted based on a preliminary plan design.

DESIGN MEETING

The proposed estate plan design is presented to the clients in an outline format. Together, we will work through the details of the plan design to create a customized estate plan strategy that meets the clients' goals and objectives while addressing their concerns and anxieties.

DELIVERY MEETING

We review the documents to ensure the clients understand their estate plan and that it meets their goals and objectives. At the client's request, we will also educate the clients' family members, executors, trustees, agents and beneficiaries about the clients' plan, their roles, and why the plan is designed as it is. The clients then sign the legal documents to implement the estate plan.

Note: Specific financial information is not revealed to family members and others unless clients choose to do so.

FUNDING

Once the estate plan documents have been executed, we assist you with beneficiary designation changes and other funding issues to ensure the planning is effective and works as designed.

LONG-TERM CLIENT CARE

For members of our Annual Estate Care Program, among other benefits, we review their estate plan annually in light of any changes in their family, finances, the law, or new planning strategies to help ensure their plan continues to carry out its original intent.