

THE PROCESS

The Steps to Create Your Estate Plan

1.

Estate Plan Questionnaire

Before we meet, we'll ask you to fill out and return an Estate Plan Questionnaire with information about you and your family, your assets, and your estate planning goals. We carefully review your Questionnaire before our Planning Meeting so we understand your needs and can offer substantive advice at our meeting.

3.

Design Meeting

We meet with you to go over the design facets to your plans, for example, trustee and successor trustee, trust protector, specific gifts, beneficiaries, contingent beneficiaries, standby trusts, and other provisions tailored to your goals and family

5.

Funding Meeting

Whether you want to avoid probate or protect assets from nursing home costs, you need to either have assets pay to your trust at death or transfer ownership of assets after creating your trust.

2.

Initial Consultation

During our Planning Meeting, we'll describe the basics of the estate planning process and discuss your goals for your estate plan. After listening carefully to your needs and wishes, we'll offer our recommendation on the best plan to meet your needs, and discuss pricing. If you're ready to move forward, we'll schedule your Design Meeting.

4.

Signing Meeting

At this meeting, we'll walk you through each of your estate plan documents to make sure you understand how they work. You will then sign your documents and make your plan official..