

Estate Planning: Our Process

1

Discovery – we'll get acquainted and discuss your needs and concerns. Generally 30-60 minutes by phone or in person.

2

Design – we determine the appropriate solutions and customize your plan. A minimum of 60 minutes.

3

Review & Signing – your documents will be sent to you for review, then we'll meet to sign them. 60+ min.

4

Asset Protection – we'll work with you to properly title assets & rename beneficiaries so your plan will work.

5

Maintain & Update – our Estate Protection Plan provides annual reviews, free amendments, & continuing education.

Estate Planning Process (Cont.)

1

Discovery – you teach us about your family and we'll teach you about the law. Price quoted.

2

Design – the nitty, gritty details. May be combined with Discovery meeting. ½ payment due.

3

Review & Signing – we review & revise until it's right. You'll leave the Signing with your docs. Balance due at Signing.

4

Asset Protection – we provide basic advice, or we can take care of it completely for an additional charge.

5

Maintain & Update – a reasonable annual subscription ensures that your estate plan is always current, and also provides other benefits such as Docubank enrollment, discounted services for you and your family, exclusive events, etc.