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Understanding our Process of Estate Planning

2 Hours - No Cost *Workshop: "How to Protect Your 'STUFF' in 3 Easy Steps"

Educate. Establish relationship.

Present planning goals. Outline the process.

60 – 90 Minutes – No Cost

"The Vision Meeting"

"Estate Plan Audit" to clarify client's goals.

Show client options to reach goals. Client chooses plan.

"The Design Meeting"

Obtain client's personal and financial information.

Review counseling issues. Design the plan.

"The Signing Meeting"

Review plan and ensure accuracy.

Client signs legal documents. Do "Funding Roadmap."

"The Funding Meeting" Get your boxes in your wagon!

"Funding Roadmap" to make \$tuff work with the plan.

Client signs funding documents.

Lawyer's Review

Ensure plan design and funding are completed.

Create action plan for unfunded assets.

* Please note: If you do not wish to attend a Workshop, and would like to start with an Initial Meeting, you may be billed at our attorney's normal hourly rate.