

# Estate Planning Process

## Step 1

### Meet & Greet

- The process begins with a 15-minute call with an estate planning attorney where we hear more about your client's goals.

## Step 2

### Questionnaire

- The client completes a Family Profile via a secure portal.
- Clients complete the Family Profile online, which can be completed with the financial planner. This initial step ensures we gather all necessary family and financial information to tailor the estate plan to their specific needs.

## Step 3

### Peace of Mind Planning Session

- During the initial consultation, which we call the Peace of Mind Planning Session, we discuss the client's estate planning goals, concerns, and wishes. This conversation allows us to understand their unique situation and objectives.
- The Peace of Mind of Mind Planning Session is a one-on-one consult with an estate planning attorney that lasts approximately one hour. The planning session fee applies to the estate planning package the client ultimately chooses.
- During the Peace of Mind Planning Session, we walk the client through their estate planning options, explaining the advantages and disadvantages of a will-based and a trust-based estate plan. Your client will then have the knowledge necessary to choose the estate plan that best meets their goals. This personalized approach ensures that each plan aligns with the client's financial and personal circumstances.
- We prepare an engagement agreement for the client to sign and collect our fee.

## Step 4

### Plan Creation

- The next step is a Design Meeting where we work with the client to craft their estate plan based on their family's unique needs.
- We then draft the estate plan based on the Peace of Mind Planning Session, questionnaire responses, and the client's wishes communicated during the Design Meeting.
- The client then receives drafts of the major estate plan documents uploaded to our secure client portal.
- Next, we schedule a 90-minute Draft Review Meeting with the client to review their estate planning documents and allow the client to ask questions and make minor changes. We also address any final concerns, and the client approves the estate plan. This step ensures transparency and allows clients to understand the details of their plan.
- We confirm the signing meeting and print the estate plan in preparation for execution.

## Step 5

### Plan Execution

- All signing meetings take place in person, with the estate plan executed in front of a notary and witnesses, if applicable, ensuring their plan meets all legal requirements.
- We scan the executed estate plan and upload the digital files to our secure portal for the client to download for their records.
- The client receives a finalized estate plan binder with the original signed documents along with funding and storage instructions. This comprehensive binder ensures that all documents are organized and easily accessible.
- Clients follow the Funding Instructions we provide to transfer assets into their Trust, if applicable, to avoid probate. This crucial step helps protect their assets and ensures a smooth transition for their loved ones.