

What is the Process of Setting Up Your Estate Planning?

Setting up your will, trust and other estate planning documents is easier than you might think. I can guide you through the process and answer all of your questions. Remember, the decisions which you make regarding your documents are not set in stone - you will always have the option to change your mind, which is especially important as your life changes. The following steps are a general outline of the planning process:



STEP ONE: INITIAL MEETING

We will meet and I will explain what estate planning is and how it can help you. I will also take down information from you regarding your assets and walk you through the various decisions for your documents. To get a head-start, it is a good idea for you to bring the most recent monthly account statements for your bank, brokerage and retirement accounts, as well as life insurance policies.



STEP TWO: REVIEW YOUR DRAFTS

In about one week, I will mail you a binder containing drafts of all of your documents for your review. The binder will contain a cover letter from me, and the letter will summarize each of your documents to help you review them. If you have any questions regarding your review, or need assistance in reviewing your documents, you can always pick up the phone and call me.

My cover letter will also contain other "to-do's" for you to help me finalize your documents and letters to third parties for title transfers.



STEP THREE: CALL ME

Call me with your questions, corrections, changes, etc. and we can also set our second appointment to sign your documents.



STEP FOUR: SECOND APPOINTMENT TO SIGN

We meet for a second time so you can sign your documents. At that time, you will also sign transfer letters, which request your banks and other financial institutions to change title of your assets to your new trust. After the meeting, your estate planning will be in place and you are finished!

CONGRATULATIONS! After you are finished, you can still contact me for any questions you may have on maintaining your plan or other issues that may arise.