

## Estate Planning

When you call, our welcoming receptionist will greet you and connect you with a member of our estate planning team. We will address any preliminary questions you may have, schedule your initial meeting, and gather all necessary information, including any documentation your attorney will need before your first appointment.

It is essential that we have a complete understanding of your family background, finances, and goals to develop the best plan moving forward. This step is crucial to ensuring we can effectively advise you on the most suitable course of action for your personalized estate plan.

During your initial meeting, we will discuss your personal goals for your estate plan and determine whether estate tax mitigation is necessary. We will explain the various planning options available to you and establish a course of action that best meets your needs. By the end of this meeting, you should have a clear understanding of our proposed plan and the associated costs. In most cases, we offer a flat-fee engagement based on the complexity of your estate planning needs. For more complex, ongoing planning, an hourly engagement may be more appropriate.

Once you decide to move forward with our team, we will begin preparing the necessary documents. After completion, we will send them to you for review and approval, incorporating any requested changes.

During our final meeting, we will thoroughly review your documents, explain their function, answer any questions, and advise you on the necessary steps to ensure their long-term effectiveness.

What sets us apart from our competitors is our commitment to post-signing communication. We remain available to you, encouraging periodic review of your documents to ensure they continue to reflect your estate planning goals.



*We pride ourselves on being team players and not overstepping our areas of practice. We enjoy close working relationships with other professionals and if you have a matter that we are not comfortable handling, we will let you know and refer you to someone we know can best handle your needs.*