

Timeline of an Estate Plan

So you are ready to think about your estate planning, but you are unsure of what it entails. Here is a timeline of what to expect.

Brief telephone call with you

- During this call we will discuss you, your family, your reasons for completing your estate planning, and answer any questions that you may have.
- You can schedule an initial in-person meeting at this time, or you can wait until you receive our follow-up e-mail.

Follow-up e-mail

- We will forward to you our estate planning questionnaire, which gives you an idea of some of the things you will need to think about when completing your estate plan and should be filled out prior to an in-person meeting.
- This document can be completed digitally and e-mailed back to me. You can call or e-mail us to schedule an in-person meeting at this time.
- The e-mail will include the hourly rate, but we will not be able to provide fee estimate until after the initial meeting. The estate planning questionnaire often brings to light any issues that may require more detailed planning.

At your in-person meeting

- We will review your estate planning questionnaire, including your financial assets and beneficiary designations for your assets.
- You can let us know any special concerns or instructions you have regarding how you would like to provide for your family and any charitable and non-charitable bequests that you would like to make.
- We will provide you with a recommendation for your estate plan, a background for the tax and non-tax reasons for our recommendations and a fee estimate.

After your in-person meeting

- We will send you an engagement letter that details the type of plan we recommended, the estimated cost, and the amount of the retainer.
- Once you return the signed engagement letter and the requested retainer, we will begin drafting your documents.

You will receive a copy of your draft documents and a letter helping to guide you through them.

- After you review the documents, you can contact us with any questions you have or changes that you would like to make. We will schedule a date and time to sign your final documents

We will finalize your documents with any changes that you requested.

Signing meeting

- We will review your documents to make sure that they say exactly what you want them to say.
- You will sign your documents.
- The remainder of the fee is due.

You should check in with us if you have a life event that may warrant updating your plan.