What will your experience in the Estate Plan Process be like with us?

Step #1: Scheduling our Initial Consultation:
You have been considering your need to protect yourself and your family's future-- and now you are ready to take action in moving forward with an Estate Plan. Once your appointment is scheduled, you will receive a questionnaire, so Andrea can be prepared for your appointment.

Step #2: Our Initial Complementary Consultation:
We know the Estate Plan Process is very personal and we are here to meet you and get to know you and your needs. You will also get to know us and how our firm works. At the end of the discussion, you'll decide if you are comfortable enough to take the next step.

Step #3: Design and Development of your Personalized Plan
This is where we go to work for you. Each plan will be personalized and developed for you and your family's needs. Initial documents will be formulated.

Step #4: "Signing Party" a Follow-up meeting
Documents may be ready for signing at your second meeting and any changes or additional documents will be discussed and implemented. The development of your personalized Estate Plan may be simple and straightforward; or may be an ongoing process. Therefore, the timeline will vary from one week to a month, or more.

Step #5: What did I sign? What do I do next?
We review with you the signed documents to make sure you understand what we did and where to go from there. We discuss the funding process of any trusts that were developed and make sure your assets and beneficiaries are in place. We will continue to answer any follow-up questions you have to make sure you are comfortable with the plan and understand the strategies implemented.

Step #6: Life Happens!
Life is never simple and always changes— Please contact us whenever a change in your life occurs. Also, make sure you schedule your annual reviews to ensure we are still on track.