

Estate Planning

When you call us, you'll be answered by our welcoming receptionist who will direct your call to the lead paralegal for estate planning matters who will begin the client intake process. They will answer any preliminary questions you have, schedule the initial meeting, and gather all necessary information including any documentation that your attorney will need prior to your initial in-person meeting.

Our team will immediately get to work carefully reviewing your documents. It is imperative we gain all of the necessary background information about your family, finances, and goals to develop the best plan of action moving forward. This step is imperative so that we are prepared and ready for your initial in-person meeting, and we're willing to put in the work.

In your initial meeting, which is typically around an hour and a half, we will further inquire as to your family, finances and estate planning goals, so that we can help determine the best form of planning. We will provide an explanation as to the various options you have in estate planning and set a course of action that best meets your needs.

When you leave your first meeting, you will ideally have a clear path as to our proposed planning and the cost for our services. Most often we are able to provide a flat fee engagement based on the complexity of your estate planning needs. Half of this cost will be due up front, along with the signing of a Retainer Letter. The second half will be due following your receipt of all draft documents. For more complex planning, an hourly engagement with a reasonable retainer payment may be more appropriate.

Once the decision to move forward with our team has been made and the initial payment is received,

we begin preparing the proper documents. This typically takes 4 weeks, but can vary based upon your needs. Once compiled, we will mail or email the draft documents to you for review, and send to other professionals upon request. Any changes that need to be made to the documents are often most efficiently relayed via email or over the phone.

The final meeting will ideally be a signing meeting, during which we will review all of the documents, their use and purpose and the appropriate action items needed to make them effective. We will clearly articulate action items that remain outstanding and whether those action items will be handled by our firm or by you.

Putting us a step above our competitors is our post-signing communication with clients. We remain available, encouraging you to come in from time to time to review documents and make sure everything still lines up.



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.