How We Help You Plan Your Estate

We start with the premise that each and every estate, regardless of size, is an important one. Whatever the size of your estate, you have spent your life accumulating it and want to preserve it from unnecessary taxes and administration fees and costs so that you can plan in a meaningful way for those you care about.

To efficiently provide basic information we will need to discuss your estate planning, we ask that you complete and return our Estate Planning Information Worksheet prior to your appointment. Using this information, we will be better able to understand your present and future situation and your actual wishes in this matter. In addition, completing a short questionnaire like this in advance of your appointment will help you focus on exactly what your estate planning goals and objectives are and what the needs of your family and other beneficiaries will be after your death. Please return this completed Worksheet at least 48 hours before your appointment so that we get to know a little about you ahead of time and so that we can initially calculate to what extent we will need to plan for applicable taxes.

At our initial conference, we will review your assets with you and find out about you and your loved ones. In particular, we need you to teach us about your family and to discuss your family goals and objectives. We will then teach you about estate planning, and together, we will outline an estate plan which will be custom designed to meet your specific needs and goals. At this initial meeting, we will also discuss fees and should be able to quote you a fee for the work you want us to perform for you. (We try to proceed at the pace with which you are the most comfortable. Consequently, in some situations, our initial planning may require two or more separate meetings.)

Several weeks following the initial conference or conferences, you will return to our office to review and sign your estate plan documents. At this time, we will have prepared your entire foundation estate plan, and we will review it with you in detail, carefully explaining each document and pointing out what the documents do for you and how they interact with each other. If the plan meets with your approval, you will sign the documents.

As we will explain when we meet, giving your plan effect will require both appropriate estate planning documents and the appropriate titling of your property. Since control follows title, estate plan documents do not work unless the way you own your property allows them to. The focus of the final phase of our planning process will be deciding how you should own your various assets so that your planning documents work and then changing titles and ownership (if necessary) to effect these decisions.

Throughout this process, it will always be our goal to work with you to provide you with the information you need to make good choices for yourself and your loved ones. Our role is not to dictate choices to you but to provide you with applicable alternatives so that you can make choices that best fit your family and best give effect to your plans, goals, dreams and aspirations.

We look forward to meeting with you to start this process.

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