



01 INITIAL CONSULTATION

Let's spend 15 to 30 minutes and find out your needs and if we are the right firm to help.

03 2 HOUR DEEP-DIVE

Schedule your 2-hour Deep-Dive & pay a small deposit to hold your spot – We will send you a link to pick a date and time that is convenient for you. Once you engage us, your deposit will be applied against your fixed fee.

PREPARE for your 2-Hour Deep-Dive – talking about estate planning can be difficult. Be sure to go through the questions below and talk about it with your partner BEFORE your appointment.

MEET with your attorney to help you navigate through your options concerning the complex and difficult issues surrounding your estate planning.

05 1 HOUR REVIEW MEETING

Our team works together to prepare estate planning documents that reflect your wishes. Drafts are provided in a secure cloud for you to review.

Our attorney arranges a REVIEW MEETING with you to go over your drafts and discuss comments or answer questions.

07 YOUR ESTATE PLANNING BINDER

About a week after your signing ceremony, you receive the original signed Estate Planning documents for your safe keeping as well as a copy of the documents in a binder, online and on a flash drive.

WHAT IS THE PROCESS

It takes about 6 to 8 weeks to go naturally through the estate planning process.

(Your estate plan can be expedited for an additional fee.)

02 ONLINE QUESTIONNAIRE

You spend about an hour on your own filling out our online questionnaire with as much detail as possible. When finished, press the "Complete" button to send it to us electronically.

04 SIGN YOUR ENGAGEMENT LETTER

At the end of your 2-Hour Deep Dive, your attorney will be able to give you a fixed price quote for drafting your plan. You'll receive an engagement letter in the next few days confirming that fixed price and an outline of the work you requested.

When you SIGN your engagement letter and return the deposit for half the quoted fee, we start creating your plan!

06 SIGNING CEREMONY

You are almost done! Come into our office and sign your estate planning documents in front of two witnesses, a notary and your attorney.

BECOME A MEMBER- YOUR LIFETIME LAWYER™

Keep your Plan updated with your life changes by joining our MEMBERSHIP PROGRAM Call us anytime with a quick question. Make basic changes to your estate plan.

(Ask for our detailed brochure)

