



ESTATE PLANNING PROCESS

Completed EP in 6-8 weeks from the comfort of your home or place of convenience.

Time Commitment: 2-3 meetings, 1-2 hours each meeting.

STRATEGY SESSION

Get to know your needs and goals.
Personalized Overview of the State's Estate Plan.
Recommended Comprehensive State plan and cost.
Engagement.

DESIGN MEETING

Design a personalized and attorney guided estate plan that meets your unique needs and goals.

**Often at the same time as the Strategy Session*

SIGNING MEETING

Signing and notarization of your legal documents.

DELIVERY

Your final estate plan is delivered to you with original copies in a portfolio. Final portfolio includes trust funding (if applicable) and probate avoidance guidance.

ONGOING PROTECTION & PEACE OF MIND

Free review of your estate plan every 3 years. (If you experience any life changes please contact us sooner.)

We're here for you if you have any questions or need assistance with your plan.