



## Step 1 Questionnaire

- Questionnaire mailed, emailed, or downloaded from our website
- Completed questionnaire returned to the office via mail, e-mail, or fax

## Step 2 Initial Consultation

- Discuss estate planning goals, concerns, and wishes.
- Attorney Rowe develops and recommends an appropriate estate plan to meet the client's goals.
- Engagement agreement prepared and signed by attorney and client
- Signing meeting scheduled in 1 month to execute an estate plan

## Step 3 Plan Creation

- Estate plan drafted
- Synopsis of estate plan provided to client via mail or e-mail for review and approval.
- The signing meeting has been confirmed, and the estate plan printed
- For trusts, a summary of assets is also sent for review to the client.

## Step 4 Plan Execution

- Execute the estate plan in front of witnesses, if applicable
- The executed estate plan is scanned, the digital file is saved, and it is provided to the client.
- The client receives closing and storage instructions for the finalized estate plan binder.

## Step 5

### Assistance with Account Titling, and Beneficiary Designations

- For any plan, even the most basic Wills, the client plays a key role in the process by following Instructions to ensure that the beneficiaries for their accounts are properly designated. If the client has a trust, their assets must be funded to the trust. If the client intends to use a Will, the client must not have any beneficiaries on their accounts. This step is crucial as the whole estate plan can be a waste of the client's time and money without taking these crucial steps ensuring a smoother transition of assets.
- We provide a custom packet of step by step instructions for each trust client, detailing how we recommend that each of their specific assets are transferred to their trusts.
- For trust clients or other clients who elect the option, after signing, we are available to the client for a period of 4 weeks for questions regarding designation of beneficiaries, assets or trust funding
- For trust clients, or those who elect the option, we personally reach out to the client's financial advisors to give our recommendations on account ownership and designations in accordance with their trust.