Welcome!

The Client
Welcome Guide

Hello!

Welcome to our Client Family! We are so excited to create an estate plan for you and look forward to serving you.

Getting Started

We are so glad you've joined our Client Family! It is our goal to make this process as painless as possible. We've create this guide so you have an idea of what to expect in the upcoming weeks. As always, feel free to reach out if you have questions.

Now that you have decided to move forward with your estate planning, you can expect three things from me via email:

- An Engagement Letter
- An invoice
- A link to schedule your Estate Plan Design Meeting

Please complete the above as soon as possible so we can get started on your planning!

Jillian

PS - Your trust in my firm means a lot - thank you again!

The Process

Peace of Mind Planning Session Meeting #1	**Estate Plan Design Meeting** Meeting #2	**Document Review Meeting** Meeting #3
Signing Ceremony (in person) Meeting #4	**Binder Delivery + Trust Funding**	**Complimentary Annual Review**

PEACE OF MIND PLANNING SESSION 1

Your Peace of Mind Planning Session is a chance for us to get to know each other, review your goals and objectives, and talk about your options and our packages and fees. Now that you've decided to move forward, the next step is to schedule your Estate Plan Design Meeting!

2 *ESTATE PLAN DESIGN MEETING*

Your second meeting with us is your Estate Plan Design Meeting. We'll roll up our sleeves and design your Revocable Living Trust and other estate planning documents. Nothing you decide in this meeting is set in stone; you'll have lots of chances to make changes throughout the process. This meeting will happen via Zoom.

DOCUMENT REVIEW MEETING 3

After your Estate Plan Design Meeting, we'll draft your Trust and other estate planning documents.This will take us about 2 weeks. Once your documents are ready,we'll email them to you for your review (it will be about 80 pages!) After you've had a chance to look them over, we'll hop on another Zoom for your third meeting with us - the Document Review Meeting. We'll go over the documents together and answer your questions so you feel comfortable signing.

The Process, continued

HOW LONG WILL THIS TAKE?

The whole process, from your Peace of Mind Planning Session to the Signing Ceremony, usually takes about 6-8 weeks. It will depend on how long you spend reviewing your documents before coming in to sign. How long it will take to move your assets into your trust ("funding" your trust) depends on how many assets you own and what kind of assets they are (real estate takes longer than life insurance, for example).

4 SIGNING CEREMONY

When you finally come in to sign your documents, we call it a "Signing Ceremony", because this is a big deal! Once your documents have been signed, notarized, and witnessed, they are official! Your family and assets are now protected. Congratulations! We will provide the 2 witnesses as required by law and the notary.

5 BINDER DELIVERY + TRUST FUNDING

After your Signing Ceremony we will prepare your Estate Planning Binder which will hold your signed Revocable Living Trust and other documents. You'll get your Binder via Fed Ex about 10 days after your Signing Ceremony. Now you can get started moving your assets into your Revocable Living Trust - aka "Trust Funding"!

6 COMPLIMENTARY ANNUAL REVIEW

Estate Planning is not something you do once and never think about again. Your life, your assets, and the law will all change. Your plan needs to keep up! We reach out once a year to see if there have been any major changes in your life that might require a tweak to your documents. This annual review is complimentary. Any changes will be billed at our then-current rates.

Frequently Asked Questions

What if we have to make changes in the future?

Not a problem! Your Revocable Living Trust and other documents can all be changed, modified, or completely revoked at any time. The fee for changes depends on the document that is being updated; an Amendment to your Living Trust will cost more than a change to your Health Care Proxy, for example. Although we recommend reviewing your estate plan every year, most people don't have to actually make changes unless there is a major life event like divorce, death, or a change in the estate tax laws.

Can you help us with the trust funding process?

Yes! If you are too busy to complete the paperwork moving your assets into your Revocable Living Trust, or just want certainty it's done right, we can fund your trust for you for an additional fee. Please contact us for a quote which will depend on the number of assets you own and whether real estate is involved.

What's the best way to reach you throughout the process?

I'm here to help! Please email me at jillian@peaceofmindplanning.co and I will get back to you within 24 hours.