

# The GERMANY LAW FIRM P.C.

Elder Law, Estate Planning, Estate Administration and Probate Litigation

## **THE GERMANY LAW FIRM ESTATE PLANNING PROCESS**

1. Client's initial call to Germany Law Firm and scheduling of intake appointment
2. Client to receive Estate Planning Worksheet/Questionnaire
3. Payment of consultation fee
4. Client to return Estate Planning Worksheet/Questionnaire and any requested documents to Germany Law Firm **PRIOR** to appointment
5. Meeting with Attorney
6. Following appointment, schedule signing appointment
7. Following appointment, client to receive intake summary, brochures, and any related information
8. Legal Services Agreement prepared and provided to client
9. Following the Germany Law Firm's receipt of the signed Legal Services Agreement AND the retainer, drafting begins
10. Attorney/PL to obtain any missing information from the client
11. Drafts sent to client and retainer earned
12. Client to carefully review drafts
13. Client to call our office to schedule an in-person call to review drafts with an attorney/paralegal. NOTE: Gather all changes so those can all be reviewed at **one** time. **If we have more than two (2) appointments to discuss changes, those are billed at our regular hourly rate per LSA.**
14. Client to provide any requested revisions no later than **five (5) business days** before your scheduled signing date
15. Signing Appointment
16. Portfolio created
17. Client to fund trust (refer to Trust Funding handout)
18. Client to check on their beneficiary designations with banks, financial institutions, insurance companies.