



1 Initial Consultation & Strategy Planning:

- Outline our firm's process
- Set expectations on what we hope to accomplish at every step
- Review your specific case and why you want the plan
- Evaluate different strategies
- Fix Pricing
- Schedule the Design Meeting
- Assign you homework

2 Design Meeting

- Examine your goals
- Design the best strategy for your case

3 Document Drafting

4 Document Signing Ceremony

- Thorough review of documents
- Assistance from legal experts during the signing
- Witnessing and formalizing your plan documents

5 Document Delivery

6 Funding

7 The future of your Estate Plan

- Regular plan reviews to ensure relevance
- Distribution of informative newsletters
- Exclusive client workshops & family gatherings