

The Estate Planning Process

Every engagement follows the same clear path, from our first conversation to the day you sign.

01 Engagement Letter

Drafted once you're ready to proceed. After the attorney reviews it, we send it to you for review and signature.

02 Retainer

Requested once the engagement letter is signed. Drafting begins only after the retainer is paid.

03 Fact Sheet

We collect the preliminary information needed to draft your estate planning documents.

04 Drafting

Our legal team prepares drafts from your fact sheet and the attorney's notes; the attorney finalizes them.

05 Review & Revisions

Finalized drafts come to you; we revise and resend until you're satisfied. Typically 4–6 weeks from engagement.

06 Signing Ceremony

About an hour long. Documents are reviewed one final time, then signed and notarized.

07 Original Documents & Trust Funding

Documents are scanned to your matter file. You receive bound originals, one copy, a flash drive of scans, and a letter detailing your originals envelope. Funding of trusts, if desired, is your responsibility with the Firm's help as requested.