

Our Estate Planning Process

Initial Conference

We begin with a general discussion of estate planning to explain the different options, including how wills and trusts are used.

Design Meeting

During the design meeting, we decide on a plan that is personalized to fit your family and your property. This meeting may be combined with the initial conference.

Signing Conference

At this meeting, we will review and explain each part of the estate plan and sign all of the documents.

Asset Alignment

All documents, including beneficiary designations, necessary to align your property with your estate plan are explained and signed. This usually takes place during the signing conference.

Family Meeting

We offer to meet with you and your Agents to give them an understanding of how your estate plan is implemented in the event of your incapacity or death. This meeting is optional.

Estate Plan Maintenance

Changes in your family's circumstances or the law are inevitable. We encourage you to periodically review your estate plan and contact us to make necessary changes.

Estate & Trust Administration

We will assist your family in the administration of your trust in the event of your disability or death.