

“WE HELP YOU PROTECT WHAT IS MOST IMPORTANT TO YOU”



SAFE HARBOR ESTATE LAW



DON'T HIRE ANYONE TO DO YOUR ESTATE PLAN
(NOT EVEN US!)

UNTIL YOU READ THIS!

10 ?'S TO ASK BEFORE HIRING AN ESTATE PLAN ATTORNEY

1. Do you focus primarily on estate law? What is your background?
2. Will you prepare customized documents for me based on my unique circumstances, family dynamics and goals, rather than slightly modifying form documents?
3. Will you periodically review my plan to ensure it's up to date as my life and the law changes through the years? Is this included in my planning fee?
4. What if I change my mind or want to change my plan? How does that work?
5. Will you help me fund my trust and ensure my assets are titled the right way? How will you do that?
6. How do you bill clients? Do you work on a flat-fee basis or will I receive a bill for every phone call, email or fax sent to your office?
7. How often will you communicate with me? What is the process and timing to get my estate plan in place?
8. What is your process for helping me protect my kids or grandkids if something happens to me and or my spouse? What if they have some kind of special need?
9. Can you help me plan not just for death and taxes, but also against life's risks such as incapacity, aging, lawsuits and divorce and future special needs?
10. Can you guide me toward making smart decisions for the future such as marriage planning, retirement strategies, saving for college and buying insurance?

Call Us Today and Ask Us These 10 Questions! (612) 615-9535