

# LAW OFFICE OF JOSHUA E. HUMMER ESQ., PLC

## Estate Planning

### What to Expect from Our Five Step Process

*We've designed the five phases of our estate planning process with the goal of being as thorough and careful as possible, while still providing you with a clear and efficient service. You have the final word every step of the way, and we won't stop until we've provided you with the peace of mind you need regarding your future.*

#### Step 1: Consultation

**What to Expect:** The consultation is an initial meeting to give us an opportunity to get to know you and answer your questions about the estate planning process. Typically, we'll ask questions about your family or other beneficiaries, as well as your assets. Don't worry if you're undecided about your beneficiaries, and don't feel obligated to bring in account statements or the exact values of any assets. In almost every case, we only need a general estimate of the value of your assets.

After we understand your goals, we will discuss different estate planning options and recommend one or more for

you. Most of the time we're able to give you the cost of our recommended options at that time. (Want to read the most commonly asked questions during consultations? Go to <https://www.jehlaw.net/estate-planning/#faqs>).

At the end of the consultation, we'll ask you to fill out a questionnaire with the names of your family members, beneficiaries and agents as well as the phone numbers for your agents. You can fill it out then or send it back to us later.

**Timing:** Most consultations last around **one hour**, although complicated estate plans may take longer.

#### Step 2: Engagement

**What to Expect:** If you decide you want to move forward with your estate plan after our consultation, we'll send you an engagement letter. This engagement letter spells out the agreement between you and us. It contains (a) a description of the work we will do for you; (b) our obligations; (c) what we need and expect from you; and (d) the cost. We may give you the engagement letter during the consultation or mail or email it to you afterwards. If you use email, we also offer the option of sending the engagement letter via SignNow, a program that allows you to sign the engagement letter electronically.



Until you sign the engagement letter, you have no obligation. We won't start working on your estate documents until we receive the signed engagement letter. It's important to us that you understand the estate planning process and that you're completely comfortable before we begin.

**Timing:** Our goal is to send you the engagement letter **the same day as the consultation**. There is no deadline for you to sign the engagement letter, but we will check in on you if we don't hear back within a week or two.

### Step 3: Document Preparation

**What to Expect:** After we receive the signed engagement letter and the questionnaire, we will begin drafting the documents for your estate plan. We'll use the information you gave us during the consultation and in the questionnaire to draw up the first drafts.

We may reach out to you for clarification or additional information about some part of the documents, but for the most part you won't hear anything from us during the process. Of course, if you have any additional questions or concerns during this time, don't hesitate to contact us - we're always happy to chat.

**Timing:** Our goal is to provide you with drafts of the estate planning documents within **2-3 weeks** of receiving the engagement letter and the questionnaire.

### Step 4: Document Review

**What to Expect:** After we've completed the first draft of your estate documents, we will send them to you along with a letter explaining them. We ask that you read the letter first and then the documents. After you've read everything, please call or email us with any questions, comments or changes you have. If it's helpful, we can schedule another meeting to go over the documents and your questions. After we have answered all your questions and made any necessary changes, we'll send you revised drafts of the documents so you can review them one more time.

**Timing:** The timing of the document review is completely **up to you**. If we do not hear from you for a little while, we will check in to see how the review is going and if we can answer any questions.

### Step 5: Document Execution

**What to Expect:** After you've approved the estate planning documents, we will schedule a final time for you to come in and sign your documents. Each estate document has different requirements, so we prefer you sign everything in our office so we can make sure that all the requirements are met.

When you come to our office for this meeting, we'll go over the documents with you one last time to make sure that they're accurate and to answer any remaining questions you have. We will also provide witnesses and a notary and walk you through the process of signing each document correctly. Once the documents are signed, we will make a copy of the originals for our files, then give the original documents to you in either an estate binder or a folder. Of course, we will be happy to answer any additional questions you have throughout this process.

**Timing:** It normally takes around **30 minutes** to review the documents and go through the process of signing them.

**Life may be uncertain, but your peace of mind doesn't need to be. Let us help you plan your estate, so that you can breathe easy knowing your family and assets are well taken care of.**