

INITIAL ESTATE PLANNING MEETING AGENDA

1. About Us

- Introduction to our law firm.
- Our estate planning process.
- Setting expectations of your attorney.

2. Estate Planning Overview

- Definition of estate planning.
- Planning pyramid.
- Reaching your goals and objectives.

3. About You

- Your hopes, fears, dreams, for you, for those you love, and for all that you hold dear.
- Your hopes and fears relating to caring for you, your family, to your financial security, community and heritage.
- Identifying and prioritizing your goals & objectives.

4. Setting Plan Goals

- Detailed analysis of any current plan.
- Presentation of goals for new plan.

5. Making The Decision

- Understanding the available solutions.
- Fee range and timetable when you choose to go forward.

6. Choosing To Go Forward

- Discussing terms of engagement.
- Set the dates for design and signing.
- Written confirmation.