

LEGACY PLANNING:

The Process Of Working With Ladies In Law

01 Free Consultation



Meet with us to determine which legacy planning documents fit your needs.

02 Client Information



After hiring us, you will fill out and return our legal questionnaire and asset inventory forms. We use this information to prepare your legacy plan.

03 Document Drafting



We draft your legacy planning documents.

04 Document Delivery



You receive a package with your legacy planning documents and instructions on execution.