

The Estate Planning Process with SJF Law Group P.A.

Step 1: The Consultation

During our consultation, we will get to know each other and have a discussion about designing a personalized Estate Plan that fits your needs. Fees will also be determined at this time.

Step 2: Our Meeting

You will arrive with a completed Estate Planning Questionnaire and our meeting will go into more detail as we discuss how to best design documents that fit your individual needs, your family needs, your business needs and more. The first half of your fee will be due.

Step 3: Reviewing Drafts

You will receive drafts of your documents to review. When reviewing, please confirm that all names, addresses and phone numbers are written correctly and that your wishes are reflected. If you have any questions or changes, let us know right away so we can ensure that you fully understand your documents.

Step 4: Signing Documents

During your signing, all documents will be signed in front of 2 witnesses and a notary. We will also discuss how to update the beneficiaries on your existing accounts. The remaining balance of your fee will be due.

Step 5: Completed Estate Plan

Your documents will be finalized and placed in a professional Estate Planning binder for your safe keeping. Electronic copies of your documents will be sent to you via email along with a reminder to update your beneficiary designations.

Step 6: Updating Beneficiaries

Now that your documents are executed, it's time to fund your trust by retitling assets and/or updating beneficiary designations. This part of the process is critical for ensuring your estate plan works the way you intend it to.

Step 7: Life Happens!

Estate Planning is an ongoing process. Life is rarely simple and always changes. Please be sure to contact us when a change in your life occurs.