

The Estate Planning Process with The Law Offices of Samantha Fitzgerald

Step 1: Schedule Initial Consultation

Schedule your appointment and make sure to complete your pre-consult questionnaire before the appointment so I can be prepared to have a meaningful conversation.

Step 2: Our Consultation

During our 30 minute consultation, I will get to know you and we will have a discussion to design a personalized Estate Plan that fits your needs. Fees will also be determined at this time.

Step 3: 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 at this time.

Step 4: Reviewing Drafts

You will receive drafts of your documents to review. When reviewing, you will confirm that all names, addresses and phone numbers are written correctly and that your wishes are reflected. If you have any questions or changes we will work together to ensure that you fully understand your documents.

Step 5: Signing Documents

During your signing, we will go over any final questions you may have and 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 for your fee will be due at this time.

Step 6: 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 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.