

What to Expect – Estate Planning

Choosing to move forward? Good for you!
Planning is important, so we want to make the process painless for you.

Many variables combine to create an estate plan that meets your unique family situation. You will receive high quality advice from our professionals. We limit our practice to the areas of law that protect you and your loved ones in a crisis. We bake you cookies and talk to you about your family dynamics, overlaid with specific information you provide about your assets, while keeping in mind relevant tax laws and state statutes.

We don't like surprises, and believe you don't, either.

We are transparent about our process and our fees. Most of our estate planning work is prepared for a flat fee, which we will discuss with you at our initial consultation. Generally, you may consult with one of our legal professionals, be given our recommendations and price, engage us, pay the required fee, get drafts to review, and come in to sign your documents, and leave with your original, completed documents (we keep an electronic copy) within a four-week period.

 SCHEDULE	1	<p>Schedule your initial consultation Call us at 407-622-1900 or e-mail info@YourCaringLawFirm.com and our client assistant will schedule your initial consultation. We offer convenient evening and weekend hours.</p>
 PRE-CONSULT	2	<p>Fill out our confidential information package We will send you our new client information package, our helpful Because You Care™ Cookie Cards, and some cookies for you to enjoy while you complete the information and gather your existing documents. The more detailed the information you provide to us, the better we may assist you.</p>
 CONSULTATION	3	<p>The initial consultation We'll listen and ask questions as you tell us your circumstances. We will review with you the information you provide, so that our advice is specific and meaningful to your situation. Most often, we will design an estate plan to meet your family's needs and agree on a fixed fee for us to create your plan. You will pay us for the work, and we will schedule your signing.</p>
 HOMEWORK	4	<p>Homework You might not have answers to everything during the initial consultation. We capture the questions and send them to you for you to ponder and respond.</p>
 DRAFTS	5	<p>Drafts You will receive your draft documents in advance of your signing.</p>
 REVIEW	6	<p>Review We will review your documents with you in advance of your signing, and make any revisions necessary.</p>
 SIGNING	7	<p>Signing We provide the witnesses and the notary and you will sign your documents in accordance with Florida law. We keep an electronic copy in our secure computer system, but your signed originals belong to you and will go home with you.</p>
 ONGOING	8	<p>Ongoing Regularly, you will be invited to our seminars and exclusive client events. You will receive our newsletters and other updates. Keep up with us on Facebook, LinkedIn, Twitter, and on our website.</p>