



The JakobLegal Difference



ESTATE PLANNING | OFFICE PROCEDURES

Your Attorney Meeting: You'll speak with us about several topics so that we can curate the plan that works for you and your family. At the meeting we'll quote your flat fee and give you our agreement to sign and collect your retainer. Your next meeting and signing will be scheduled so please bring your calendar.

We then roll up our sleeves and design your customized plan based upon your needs. You will receive a few worksheets and forms by email, they aren't "homework" just to help us move along our process.

Payment for Fees: We begin to work on your plan as soon as the retainer is paid (checks are appreciated!). The remaining balance is due on your signing date. Any out-of-pocket costs incurred by us (such as to record deeds) will be invoiced at next meeting.

Review of Documents: We want to continue our relationship over the years to make sure you are still comfortable with your plan.

Life Happens: We are all human and know that life happens with unexpected twists and turns. Our promise to you is that we will help you along the way and will be here for you and your family when you need us most.

ITEMS TO BRING TO MEETING

1. Any previous estate planning documents you may have.
2. Any Health Care Directives or Powers of Attorney.
3. Your calendar.
4. Your checkbook.
5. Deeds, if available.
6. Financial Statements, if available.
7. Any Business or Partnership Agreement
8. Any instrument or document that you believe may be relevant to your plan.