Welcome to JakobLegal

Easy Steps for Your Personalized Estate Plan

Welcome to Your Estate Planning Team

Step 1 – Initial Consultation & Engagement: Your first meeting is a **conversation with an attorney.**

At this meeting we:

- Learn about your family, goals, and concerns
- Answer your initial questions about wills, trusts, powers of attorney, and other documents
- Explain how our process works from start to finish
- Discuss fee ranges and make sure we're a good fit for you

If we all agree to move forward, we will:

- Recommend an appropriate level of planning for your situation
- Provide and review a **written engagement agreement**
- Quote a clear **flat fee** for your plan
- Collect your **initial payment** and open your matter
- Schedule your **Design Meeting** and send you your **Decision Vault** link

Step 2 – Share Key Information: (Emergency Contacts & Decision Vault)

After you hire us, your first "homework" is simple and practical. We ask you to:

- Gather **names, mailing addresses, emails, and cell numbers** for the people you might choose as:
    - Health Care Surrogate (medical decisions)
    - Financial Power of Attorney
    - Personal Representative/Executor
    - Trustee
    - Guardian(s) for minor children (if needed)
- Log into **Decision Vault**, our secure online questionnaire, to:
    - Confirm family information
    - List your real estate and where it's located
    - Outline bank, investment, retirement, and life insurance accounts
    - Mention any business interests

You **do not** need Social Security Numbers or exact account numbers. Approximations like "checking at ABC Bank, about $10,000" are perfect.

If you filled out earlier intake forms, **thank you** — Decision Vault just organizes what you've already shared and fills in any gaps.

Step 3 – Your Design Meeting: This is where we **design your plan together**.

- Review your Decision Vault information with you
- Talk through your wishes in plain English
- Help you choose:
  - Who serves as Personal Representative/Executor, Trustee, and Guardian
  - How and when your beneficiaries should receive their inheritance
- And help answer "what happens if....?" Questions

Step 4 – We Draft & Customize Your Plan: After the Design Meeting, you can relax while we do the heavy lifting. Behind the scenes, we:

- Draft your documents
- Use your Decision Vault information to align your documents with your **real-life assets**
- Prepare any supporting materials, charts and graphs.

You may receive a few short follow-up emails or forms — they're simply tools to make sure **nothing is missed**. You're always welcome to call or email us with questions.

Step 5 – Review, Signing & Next Steps: (Including Funding Your Trust, If You Have One)

At your Review & Signing appointment, we:

- Review your documents with you in plain English
- Confirm everything matches your wishes
- Make small corrections if needed
- Supervise proper **signing, witnessing, and notarization**

We also talk about **what happens after signing**, including:

- How to **title assets** and adjust **beneficiary designations** so your plan actually works
- Any **deeds** or additional documents we'll prepare (for example, to move real estate into a trust)
- How your family or trusted helpers will know what to do if something happens to you

If your plan includes a **trust**, we explain **"funding"** in simple terms:

You've created the **trust** (the "bucket" with your instructions).
Funding your trust means **changing the paperwork** so certain assets are owned by your trust or name your trust as a beneficiary. That's how your trust can actually do its job and keep your family out of unnecessary court processes.

A Final Note

You don't need to have everything figured out before you start.
Your job is to bring your questions and your best first ideas.
Our job is to guide you, turn those ideas into a clear plan, and help you keep it up to date as life changes.