The Estate Plan Process with
Andrea L. Jakob, PA

Step 1:

Scheduling our Initial Consultation

- You have been considering your need to protect yourself and your family's future. Now you are ready to take action

Schedule your appointment and make sure to complete your questionnaire by the due date so I can be prepared to have a meaningful conversation.

Step 2:

Our Consultation

- The Estate Plan process is very personal and we want to get to know you and your needs. You will also get to know us and how our firm works.

At the end of our meeting, if you decide to take the next step, an agreement will be signed and the invoice will be sent to collect the initial fee.

Step 3:

Design & Development

- Once the initial invoice is paid, I will begin development of your personalized plan, designed for you and your family's needs

We meet a few times to discuss how to best design your documents. The development of your Estate Plan may be simple and straightforward; or may be more complex and need additional meetings.

Step 4:

Signing Documents

- The second half of your Invoice will be due at the time of either our signing appointment or 30 days after our document review session, whichever occurs first

Our signings are planned in advance to ensure we have the Notary and 2 witnesses available, all documents are printed the day before.

Step 5:

Review of Signed Documents & Assets

- We meet after the signing to review the signed documents and binders to make sure you understand your Estate Plan and we discuss your next steps such as funding a trust.

We work with you, guiding you in making sure your assets and beneficiaries are in place and continue to answer any follow-up questions you have. I want you to be 100% comfortable with your plan and understand the strategies implemented.

Step 6:
Life Happens!

Life is never simple and always changes. Please contact us whenever a change in your life occurs and schedule your annual reviews to ensure we are still on track!