The Law Offices of
Jeremy A. Wechsler
An Estate & Trust Planning Practice

www.JawAtLaw.com
info@JawAtLaw.com
Voice: 215-706-0200
Fax: 215-754-4857
2300 Computer Road, Suite H-42A
Willow Grove, PA 19090

# Thank you for taking the first step in an important process of leaving a well-crafted legacy plan.

Our family is looking forward to getting to know your family. In fact, we think an excellent estate plan can be crafted only after a thorough understanding of your family. To that end, we make sure we take a generous amount of time to learn everything possible to ensure that your estate plan fits your hopes and desires.

## Estate Planning Timeline

The estate planning process consists of several steps, each of which are outlined below. Typically, the process begins two-three weeks prior to your initial consultation.

1. **An initial telephone call with our staff**: This telephone call usually lasts about 15-30 minutes. This call allows us to acquaint ourselves with you and your family and vice versa. We also take the time during this call to answer any questions, and explain the importance of completing the Personal Information Form.

2. **Complete the Personal Information Form**: This step is crucial, and we suggest that you take as much time as possible to complete this form. The more information that you provide us, the more time we can spend analyzing the estate and preparing a superior plan. This process of completing the form will also help you to gather and organize your important financial and estate documents, all of which you should bring (see the full list below). It is much

appreciated if you would email or send us the completed Personal Information Form at least a week prior to our initial consultation.

3. **Initial Consultation**: This visit is crucial to building a superior estate plan. The agenda for this meeting is packed. We get to know you, you get to know us and we learn a lot about your family. Next, our team works to educate you on an estate plan that might fit your needs, and you have the opportunity to ask questions and modify the proposed plan. Once we build a plan that meets your highest satisfaction, we ask that you formally retain our firm. We then discuss a fee that will meet the costs of the plan, and ask that half of the fee be paid during the consultation. *We offer a complete satisfaction guarantee. If for any reason, up to signing the documents, you are not happy, we will refund your entire fee.*

4. **Document Drafting/Trust Funding:** After our consultation, we immediately begin working on building your estate plan based on the plan we discussed at your initial consultation. If your plan includes a living trust, we start the process of funding the trust as well. This process takes anywhere from 2-4 weeks, depending on the complexity of the plan. Typically, we send either a will or trust summary after 2 weeks to make sure that we have the fundamental information right, such as spelling of names, etc.

5. **Review & Execution:** Once the plan is complete, we schedule another consultation where we review the plan with you and execute the plan.

6. **Plan Maintenance**: We offer several plan maintenance programs depending on your needs. We typically suggest that at a minimum, you review your plan with us every five years. We offer annual reviews, and a service to keep your documents in a secure online database, providing access to medical personnel and family members. We can discuss a maintenance plan that works for you.

Our estate planning process is designed to ensure that you leave a well-crafted legacy plan that meets every hope, wish and desire you and your family have. We appreciate you investing your time, resources and energy into building your estate plan. As we always say, a well-crafted legacy plan is truly the best gift you can leave to your family.

## Items to Compile and Bring to Initial Consultation

- ✓ Any previous wills, trusts, powers of attorney or living wills
- ✓ Pension documents
- ✓ Life insurance policies
- ✓ Beneficiary forms for each retirement account, annuity and life insurance policy
- ✓ Pre- or Post-Nuptial agreements
- ✓ List of assets and values
- ✓ Property and real estate information including deeds, mortgages, etc.

## Office Information

*Hours of Operation:* Our offices are open from 8:30 AM – 5:00 PM Monday-Friday, and we offer appointments on weekends as well.

*Communicating with Our Office*: We invite you to communicate with us via telephone (215-706-0200) or by email (info@JawAtLaw.com). We reply to all inquiries within one business day.

*Cancellations:* We understand that life happens! We ask that if you need to cancel an appointment, please do so at least one business day in advance.