

Our Estate Planning Process



Phase 1: Data Gathering

First, we gather your existing estate planning documents (if any) and you return to us the completed Estate Planning Questionnaire. You decide exactly how you would like your property to pass, and what restrictions you want to have on the inheritance you are passing. During this phase, we have the Initial Consultation.



Phase 2: Drafting

Based on the information gathered in Phase 1, we draft your estate plan. That includes your Power of Attorney, Health Care Surrogate, Preneed Guardian Designation, Living Will, HIPAA Release, Last Will & Testament, and (possibly) your Revocable Trust.



Phase 3: Read & Revise

We provide your draft estate plan. Now it's time for you to read the documents for accuracy and to make sure that your plan does exactly what you want it to do. This is the time to ask questions, make changes, and mold your estate plan into a masterpiece. During this phase, we have an Explanatory Session to answer all your questions. By the end of this phase, you should be 100% comfortable with the documents and ready to sign.



Phase 4: Finalize

You've finished the hard part. Now comes the fun part: signing everything into effect. Your Final Signing Appointment can be conducted in the conference room or via a drive-in signing. After the signing, your plan comes into effect and all older estate plans are revoked and replaced.



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THE FAULKNER FIRM

ESTATE PLANNING & BUSINESS ATTORNEYS

**Let us help your family and business.
Contact us today.**

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