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STEPS IN THE ESTATE PLANNING PROCESS

- 1) Request information packet
- 2) Return estate planning questionnaire
- 3) Time for initial client conference set
- 4) Initial client conference to discuss:
 - a) minimizing federal estate taxes
 - b) decision as to types of estate planning documents needed
 - c) information necessary to complete drafts of documents
 - d) immediate plans, if any, for vacation (or hospital visit)
- 5) Payment of ½ of estate planning fee
- 6) Client requests change of beneficiary forms for insurance and retirement plans
- 7) Documents drafted (MINIMUM of 3 week time-frame)
- 8) When you are ready to complete the process, PLEASE CALL (on or after _____)
(= 3 weeks from receipt of check) TO SCHEDULE YOUR FOLLOW-UP APPOINTMENT

Date: _____ Signature: _____

- 9) Follow-up appointment, to include:
 - a) explanation of provisions of documents
 - b) careful review of documents
 - c) changes made to documents
 - d) oversight of execution of documents
 - e) discussion of where to keep originals
 - f) advice regarding asset titling to effectuate estate plan
 - g) payment of final ½ of fee
- 10) Questions answered concerning financial institutions' requirements for re-titling assets and beneficiary changes
- 11) Review your documents at least as often as every five years