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STEPS IN THE ESTATE PLANNING PROCESS

- 1) Request and review information packet
 - 2) Time for initial client conference set
 - 3) Complete 2 sheets re: document info and assets (to bring with you)
 - 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 a portion of the 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 2nd part 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