

Estate Planning Procedures

WWLG | Western Wake Law Group

- When an estate planning client(s) calls to schedule an appointment, we direct them to our website, under “**Forms**” and then under “**Estate Planning Forms**” and ask them to print out and complete our Estate Planning Client Questionnaire and New Client Memorandum. Also, under “Forms”, bring their attention to the fact that there are two other forms for their perusal, which are titled “Estate Planning Fiduciaries & Guardian Information” and “Additional Estate Planning Documents.” Once on our website we also direct them to “**Practice areas**”, which has a discussion on estate planning. Also ensure that client is aware of link on that page that says “**read more about estate planning here**”. All of this information will help them to be prepared for the questions that they have or be asked during their initial will consultation. We also ask while reading through all of this information to consider whether they would like to have additional estate planning documents prepared (Power of Attorney, Health Care Power of Attorney, and Living).
- The client(s) comes in for their initial will consultation. An attorney looks over the forms they have completed and meets with them to get any additional information that may be needed to prepare the drafts of their wills, to explain the different kinds of trusts, and estate taxes, etc, and to give them the information that they need to make decisions regarding the distribution of their estate. If applicable, he/she will discuss with them the need for Powers of Attorney, Health Care Powers of Attorney and Living Wills, and if they want us to draft them and they have not filled out that information on the forms, he/she obtains the information needed for those documents as well.
- Once the attorney finishes the drafts send and email with the drafts to the clients.
- Once the client(s) have reviewed their documents, we instruct them in the transmittal letter to let us know of any changes that they want to have made and to call us to schedule an appointment to sign them.