

GET STARTED WITH AN ESTATE PLAN

First-time planner? This checklist is for you!

Estate planning makes a legal plan to distribute your valuables aligned with your values. Good estate plans chart a clear course of action to take care of loved ones should you become unable or pass away.

IDENTIFY YOUR NEEDS

What property do you own? How do you want to distribute your assets? Gather documentation and talk with loved ones.

Check out the checklist provided by Seasons Law, P.C. to prepare for your initial consultation.

HIRE A LOCAL, TRUSTED ATTORNEY

In choosing a firm, consider a firm's reputation, attorney experience, firm size, investment for estate plan, business hours and location.

Are you based in Northern California? Consider hiring Tracy Shows of Seasons Law, P.C., voted "Best Attorney" by Style Magazine for 2019!

SCHEDULE INITIAL CONSULTATION

A good initial meeting should demystify the planning process. Make sure you are comfortable with your attorney — they will be delving into sensitive topics and may be working with your family.

ENGAGE WITH YOUR LAWYER DURING THE PROCESS

Ask questions, arrive prepared and bring documentation.

An estate plan often takes 3 - 5 weeks to draft and execute.

EXECUTE ESTATE PLAN

Review and sign finalized documents with your attorney.

CONGRATS!

You're finished. These documents can be reviewed again later.