

WHAT IS THE PROCESS OF GETTING YOUR AFFAIRS IN ORDER?



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START

Step 1: Get Educated (Learn the difference between a will and a trust and what probate is.)

Step 2: Select an Attorney (Someone who is knowledgeable and trustworthy. Someone who will be there for you and your kids.)

Step 3: Private Consultation (Meet with the attorney to talk about your family, your assets, and your concerns.)

Step 4: Review and Execute Your Documents (The attorney explains your documents in detail. You make changes if you'd like. Once everything is perfect, you sign them.)

Step 5: Funding (Your attorney gives you detailed instructions on how to update your financial accounts to reflect your new trust.)

Step 6: Lifetime Relationship (Ongoing updates and support when there are changes in the law you should know about.)