



NAME:

DATE:

Will & Trust Attorney Interview Questions

These are essential questions to ask an estate planning attorney before you decide who will create or update your Will or Trust.

What are the "right" answers?

To see how Gaughan & Connealy stacks up, watch our video on YouTube at www.YouTube.com/MidwestEstatePlan

1. Is it just you, or do you have an office with a team to support your clients?

2. Are you a member of the AAEPA?

3. What happens to your clients when you retire? Or if you were to no longer be in business for any reason?

4. Is estate planning the only law you practice, or do you practice in other areas of the law as well?

5. Do you charge clients for phone call or email support?

6. What happens after I die? Do you meet with my kids and surviving spouse?

Why these questions matter:

Many lawyers who do this work are solo practitioners – often working out of their homes with no staff support.

The AAEPA has **much** stricter requirements for estate planning attorney's continuing education.

You need to know who'd represent you and feel comfortable with his answer. Will you be in good hands?

This is an extremely complicated area of the law – you want to work with a firm whose sole practice is estate planning.

Some firms charge hourly fees for phone calls and email support. Are you willing to pay every time you need help?

If something happens to you, will the attorney be a resource available to your surviving family? Is that meeting free?