

10 QUESTIONS TO ASK YOUR ESTATE PLANNING ATTORNEY

Ten key things you should ask before engaging a Family Estate Planning Attorney to help you get your Ducks in a Row:

1. Do you prepare a comprehensive plan for my kids' care if something happens to me, that names short and long-term guardians and gives specific instructions to all of the guardians and my caregivers? What about an ID card for my wallet listing the short-term guardians with their contact information?
2. Are all of your fees flat fees? What about for ongoing work after the initial completion of my estate plan documents? What happens when I call with legal questions 2 years after my planning documents were completed? What if the questions are about something other than my estate plan? What if my family needs help when I am incapacitated or gone?
3. Do you stay informed on developments in estate planning law over time?
4. What happens if I need to get a quick question answered and you are not available?
5. Do you make sure my assets are titled in the right way? How?
6. What happens when things change in my life? Do you notify me about changes in the law? How often do you communicate with me?
7. Does my planning fee include a regular review of my plan? What if I want to make changes to my plan?
8. Do you have any sort of an estate planning maintenance program or membership program for ongoing service and, if so, what does that include?
9. Do you have a process for helping me capture and pass on my intangible wealth, such as my intellectual, spiritual and human assets, who I am as a whole person and what's important to me?
10. Can you structure my estate plan so that whatever I leave to my kids will be protected from a lawsuit or divorce? How often do you build that kind of planning into client's plans?

Getting answers to these questions before you engage a Family Estate Planning Attorney will ensure you put in place an estate plan for you and your family that will really work when your family needs it most, and won't end up just a pile of worthless paper after you are gone.

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