Surprenant & Beneski, P.C.

Strategic Planning for Your Peace of Mind

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Welcome!

Thank you for scheduling an appointment with Surprenant & Beneski, P.C.. We appreciate the opportunity to earn your business and look forward to meeting you and discussing your wishes for estate planning. Also, congratulations on taking this next step in your planning! Our goal is to provide helpful estate planning in a clear and friendly process.

My role is to help you prepare for a successful meeting with a member of our legal team. In order to make your hour-and-a-half consultation as productive as possible, we need to collect information in advance so your lawyer can be familiar with your unique situation as soon as you walk in the door. This allows for the time you spend with your lawyer to be focused on discussing your goals and their recommendations. Once that is accomplished, they will provide you a quote to execute your customized plan.

The next step is to complete your Estate Planning Worksheet, which can be done in hard copy or on-line. We require that you submit your completed worksheet to us at least 1 week prior to your scheduled appointment so that the lawyer may review it before your consultation.

We hope you find the following information helpful. Should you have any questions before your appointment, please do not hesitate to contact me.

Warm Regards

Fiorella (Fi) Vance

Client Experience Manager

Why Clients Choose Us

You many have chosen our firm based on our specialized expertise. Our partners, Dan Surprenant & Michelle Beneski, are recognized as Certified Elder Law Attorneys (CELA) by the National Elder Law Foundation (NELF). There are only 24 CELAs in Massachusetts. Check out the requirements at NELF.org. You may value our leadership within the industry and community, such as attorney Surprenant's service as President of the Massachusetts chapter of the National Academy of Elder Law Attorneys or attorney Beneski's service as Chair of the Board for Coastline.

What that means for you is that you're working with an expert team that is uniquely qualified to help you develop a plan that will work through-out all stages of your life. Our clients benefit from working with our team of dedicated experts who convey complex legal issues into layman terms. They provide personalized, goal-based plans and support. You may have chosen our firm based on our reputation for integrity or that, as clients of our firm, you are eligible for a free three-year review to be sure your plan keeps up with changes in your life and in the law.

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Michelle D. Beneski, Esq.

Michelle D. Beneski, Esq., LLM Taxation

- *Certified Elder Law Attorney by the National Elder Law Foundation*
- *Named to the Boston Magazine Super Lawyers® 2012, 2013,2016 & 2017 & Boston Magazine Women's Super Lawyer® List (2017)*
- *Adjunct Professor, Suffolk University Law School*
- *Co-author of "Protect Your Family! Don't Write a Blank Check to the Nursing Home"*
- *Co-publishes the "Guide to Retirement & Beyond", an annual planning resource for Southeastern Massachusetts & Cape Cod*
- *Contributor to Elder Law Today*

Memberships

- *Massachusetts chapter of National Academy of Elder Law Attorneys (MassNAELA)*
- *Massachusetts chapter of WealthCounsel (a national organization of estate planning attorneys)*
- *Coastline Advisory Board*
- *Past Director of the Bristol County Estate Planning Council*
- *Past co-chair of the Alzheimer's Partnership of S.E. Massachusetts*
- *Previously served on the Board of Directors for Coastline Elderly Services, Inc.*

Education

- *Fitchburg State College (B.S. Cum Laude)*
- *Pepperdine University School of Law (J.D.)*
- *University of Florida, College of Law Graduate Tax Program (LLM in Taxation)*

Continued...

Daniel M. Surprenant, Esq.

- *Certified Elder Law Attorney by the National Elder Law Foundation*
- *2015 President of the Massachusetts chapter of the National Academy of Elder Law Attorneys (NAELA)*
- *Named to the Boston Magazine Super Lawyers® List (2015, 2016 & 2017)*
- *Co-publishes the Guide to Retirement & Beyond, an annual planning resource for Southeastern Massachusetts & Cape Cod*
- *Contributor to Elder Law Today*

Memberships

- *Massachusetts chapter of National Academy of Elder Law Attorneys (MassNAELA) (Member of the year 2013)*
- *Massachusetts chapter of WealthCounsel (a national organization of estate planning attorneys)*
- *Special Needs Alliance*
- *Past Director and Treasurer of the Massachusetts Forum of Estate Planning Attorneys*
- *Past Vice-Chair of the Southcoast Senior Resource Association*
- *Past President of the Bristol County Bar Association*
- *Previously served on the President's Advisory Board for Bishop Stang High School.*

Education

- *University of Massachusetts at Amherst*
- *Suffolk University Law School (J.D.)*

Continued...

Brandon C. Walecka, Esq.

- *Certified Elder Law Attorney by the National Elder Law Foundation*
- *Named to the Boston Magazine Super Lawyers® Rising Stars List (2015, 2016 & 2017)*
- *Contributor to the Guide to Retirement & Beyond, an annual planning resource for Southeastern Massachusetts & Cape Cod*
- *Contributor to Elder Law Today*

Memberships

- *Massachusetts chapter of National Academy of Elder Law Attorneys (MassNAELA)*
- *Serves on the publications committee of MassNAELA*
- *Massachusetts chapter of WealthCounsel (a national organization of estate planning attorneys)*
- *President of the Bristol County Estate Planning Council (2014-16)*
- *Serves on the Board of Directors for the Massachusetts Forum of Estate Planning Attorneys*
- *Serves on the Caregiver Resource Collaborative*

Education

- *University of Massachusetts – Dartmouth*
- *University of Massachusetts School of Law – Dartmouth*
- *Master of Laws (LL.M.) Elder Law, Stetson University College of Law in Gulfport, Florida*

Continued...

Erin L. Shea, Esq.

- *Named to the Boston Magazine Super Lawyers® Rising Star (2017) & Boston Magazine Women's Super Lawyer® List (2017)*
- *Contributor to the Guide to Retirement & Beyond, an annual planning resource for Southeastern Massachusetts & Cape Cod*
- *Contributor to Elder Law Today*

Memberships

- *Massachusetts chapter of National Academy of Elder Law Attorneys (MassNAELA)*
- *Massachusetts chapter of WealthCounsel (a national organization of estate planning attorneys)*
- *Serves on the Human Rights Committee of Comprehensive Mental Health Systems in Dartmouth, MA.*
- *Southeastern Massachusetts Alzheimer's Association Partnership*

Education

- *University of Massachusetts – Dartmouth*
- *University of Massachusetts School of Law – Dartmouth, Magna Cum Laude*

Our Process

At Surprenant & Beneski, we want to help you understand your options and execute a plan that achieves your goals. Here is our process for defining, executing and maintaining your plan:

Prepare for your consultation

Complete and submit your Estate Planning Worksheet.

Meet with us

Your planning session will be an hour-and-a-half. At this meeting, we will provide an overview of the firm, review your goals and concerns as well as your completed worksheet. Once we understand your goals and circumstances, will also discuss our recommendations and provide a quote. There is no obligation to proceed at the conclusion of the meeting. When you wish to proceed, we will then sign an engagement agreement outlining the work to be performed and schedule a signing meeting (3 – 4 weeks out). Your consultation fee will be applied to work valued at $1,000 or more.

Review and Sign

Once we have had an opportunity to prepare, draft and review our legal documents, we will meet for your scheduled signing. Each document will be reviewed thoroughly with you by our staff. This meeting typically last an hour to an hour-and-a-half.

Continued...

Our Process

Follow up guidance on executing your plan

VERY IMPORTANT: *If your plan includes the creation of a trust, the key to making the trust work is to properly fund it, meaning that you sign all relevant documents transferring your assets to your trust. Our team will provide you with detailed instructions to ensure that the necessary steps are completed.*

FREE three-year review

We want to ensure that your plan works how and when you want it to. To help maintain the accuracy of your plan, we offer our clients a FREE three-year review. We will notify you when you are at the three year mark and invite you for a half-hour review meeting. At that time, we will remind you of what you did and why you did it and review how any changes in your circumstances or the law are impacting your plan.

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Your Planning Session

We have reserved a one-and-a-half hour session for you to meet with your attorney. If married, both spouses must be in attendance. If you wish to have other people who will support your decision making process (child, financial advisor, etc.) attend, it's important for all parties to be present for the full session. If unable to attend in person, we can facilitate a conference call or adjust the scheduled time.

To have a productive meeting, we will review the following:

Firm overview

We're certainly not your only choice for estate planning, and we want you to feel comfortable in your decision to work with us. We will share our team's experience and expertise and how we will all work together to achieve your goals.

Goals

We want you to share with us your planning goals. What things do you want to achieve or avoid? What questions or concerns do you have? Our attorney will try to point out some issues that you may be overlooking.

Worksheet review

We will review the Estate Planning Worksheet that you completed. In most cases, clarification or omissions need to be discussed so that the attorney can have an accurate picture of your situation and properly advise you.

Recommendations

Once the attorney has an accurate picture of your goals, assets, family, and circumstances, they will make recommendations to meet your goals and summarize the associated pricing.

Pricing

As you may understand, without knowing your circumstances, including your goals, health, assets, children's circumstances, etc., it is very difficult for us to quote pricing. Unlike some firms, we are not a "one size fits all" operation. Since every plan we create is based on the client's individual goals and set of circumstances, we customize each plan we recommend. A multitude of considerations are taken into account when fees are calculated including the level of complexity of your plan and the amount of work required. Before you get started, you will be satisfied that the financial and emotional benefits far outweigh the investment.

Towards the end of your consultation, we will discuss our recommendations and provide you with a quote. There is no obligation to proceed at the conclusion of the meeting. If you wish to proceed, we will sign an engagement agreement outlining the work to be performed and schedule a signing meeting (3 – 4 weeks out). Your consultation fee will be applied to work valued at $1,000 or more.

Additionally, we offer payment plans and accept credit card payments.

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Driving Directions

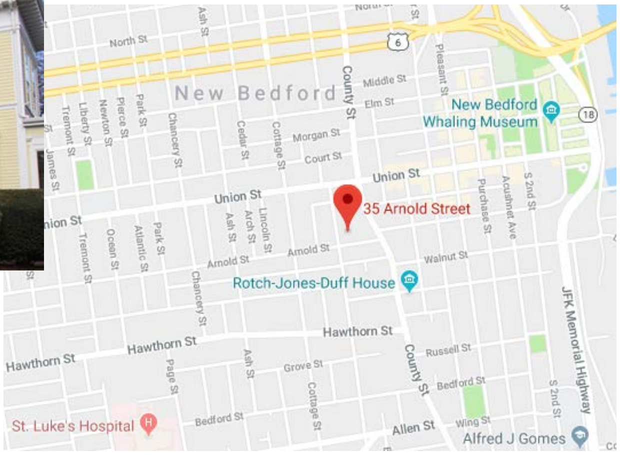
Directions to our New Bedford Office

35 Arnold Street, New Bedford, MA 02740

**** Please direct ALL correspondence to New Bedford office***

From Boston/Points North:

- *Take I-93 South to Route 24 South to Route 140 South to end (set of lights)*
- *Cross onto Brownell Avenue and follow to first set of lights on Hawthorn Street (Buttonwood Park will be on your right)*
- *Turn left onto Hawthorn Street, straight through lights at Rockdale Avenue.*
- *Continue past St. Luke's Hospital on your right and straight through lights at Cottage Street.*
- *At four way stop at Hawthorn and Orchard Street, turn left onto Orchard and follow to Arnold Street.*
- *Cross Arnold Street and enter our parking lot on the right. We are in the yellow building.*



From Route 195 East:

- *Cross onto Brownell Avenue and follow to first set of lights on Hawthorn Street (Buttonwood Park will be on your right)*
- *Turn left onto Hawthorn Street, straight through lights at Rockdale Avenue.*
- *Continue past St. Luke's Hospital on your right and straight through lights at Cottage Street.*
- *At four way stop at Hawthorn and Orchard Street, turn left onto Orchard and follow to Arnold Street.*
- *Cross Arnold Street and enter our parking lot on the right. We are in the yellow building.*

From Route 195 West:

- *Take Exit 15 for Route 18, Downtown / New Bedford;*
- *At the 2nd set of lights, take a right onto Union Street*
- *Follow Union Street for approximately 0.4 miles to the lights at County Street (5th light)*

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Driving Directions

Directions to our Hyannis Office

336 South Street, Hyannis, MA 02601

**** Please direct ALL correspondence to New Bedford office***

From Sagamore Bridge:

- *Route 6 east to Exit 6, bear right at the bottom of the ramp to Route 132*
- *Go through the first 2 sets of lights. Just before the 3rd set, bear right onto Bearse's Way (Cape Codder Hotel & Resort will be on your right).*
- *Continue straight through the next set of lights (intersects with Route 28)*
- *About ½ mile up the road, go ¾ of the way around the roundabout onto High School Road (Kennedy Skating Rink will be on your right).*
- *Go through the next two sets of lights, the second of which will be Main Street.*
- *We are the third driveway on the right, just before South Street. There is a small sign that reads "336 Law Office Parking". White building*

From Route 6 West:

- *Route 6 west to Exit 7 (Willow Street). Go left on Willow Street, cross Route 28 to the end. Take a right on Main Street. At the third traffic light, turn left on High School Road.*
- *We are the third driveway on the right, just before South Street. There is a small sign that reads "336 Law Office Parking". White building*

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Driving Directions

Directions to our Easton Office

45 Bristol Drive, Easton, MA 02375

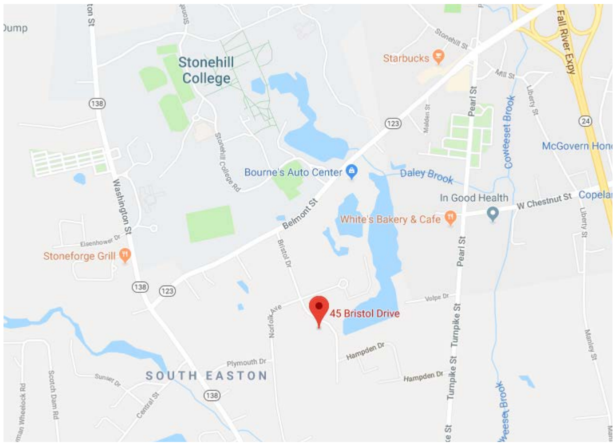
**** Please direct ALL correspondence to New Bedford office***

From Boston:

- *Take I-93 South to Route 24 South. Stay to the LEFT for exit 4. Follow 24S to exit 17B – Belmont Street, Easton, Route 123.*
- *Continue on Route 123 West, Belmont Street to Bristol Drive in Easton (the Industrial Park). Turn left onto Bristol Drive.*

From Other Points North:

- *Take 128 South to Route 24 South. Stay to the LEFT for exit 4. Follow 24S to exit 17B – Belmont Street, Easton, Route 123.*
- *Continue on Route 123 West, Belmont Street to Bristol Drive in Easton (the Industrial Park). Turn left onto Bristol Drive.*



From South of Brockton:

- *Take Route 24 North to exit 17B. Follow 24 South to exit 17B – Belmont Street, Easton, Route 123. Continue on Route 123 West, Belmont Street to Bristol Drive in Easton. Turn left onto Bristol Drive.*

When you reach 45 Bristol Drive there is parking in the front of the building. Our office is on the first floor. When you enter the building follow the hall to the right of the elevator. We are the third door on the left. We share an office with Attorney Gerald Sousa. When you arrive you can let the receptionist know you are there to meet with an attorney from Surprenant & Beneski, P.C.