

## 1. Contact us!

Speak with our Client Service Team and let us know how we can help. Most of the time, the hardest part of the estate planning process is taking the initiative to get started. Whether you were referred by an existing client, another professional or found us online, the hardest part is just getting started.

In this initial call with our Client Service Specialist, we'll...



*Introduce the firm, and give you details on our experience and expertise*



*Understand your general goals*



*Confirm if we can be of assistance*



*Find a good time to discuss further*

### Our Client Service Team



Fiorella Vance  
Client Service Manager



Cassandra Botelho  
Client Service Specialist

## 2. Book a consultation

Our Client Service Team will help coordinate your schedule with the appropriate member of our legal team and set-up a consultation that meets your preferences.



Virtual Meeting via Video

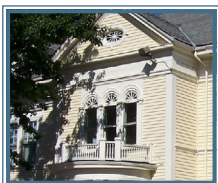


Phone Call Meeting

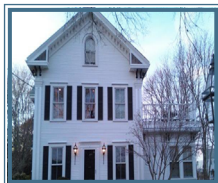


Alternate meeting locations and accommodations available as needed.

In-person meeting at one of our 3 office locations:



*New Bedford*



*Hyannis*



*Easton*

Plan to include whomever you would like: adult children, trusted friend, your financial advisor, your CPA, etc.. We will work to accommodate their participation in the meeting (video conference, if needed, etc.)

## 3. Complete a Consultation Prep Worksheet

We advise sending in your completed consultation prep worksheet by the return date provided. This allows our attorneys to familiarize themselves with your information prior to your consultation. This makes the 90-minute meeting focused on hearing your concerns and goals, making your time more productive.

Note: Please don't feel overwhelmed. Not all areas of the worksheet may be applicable to you. Please reach back to our client service team for assistance.

In addition to completing the Consultation Prep Worksheet, please prepare copies of existing wills, trusts, or estate planning documents, statements for all banks, brokerage and retirement accounts, along with any life insurance policy statements, LLC or Partnership Agreements and the deed to any out of state properties.

## 4. Meet with your Attorney



We'll review your worksheet with you to better understand who you are, beyond what is written on paper.



We'll explain relevant estate planning concepts, and how those concepts are applicable to you, generally.



We'll design your specific estate plan by discussing the pros and cons of various options.



We'll provide you with a quote for the estate plan design you have chosen.

From there, you'll decide if you want to move forward with using our services to draft your estate plan.

## 5. Estate Planning Draft

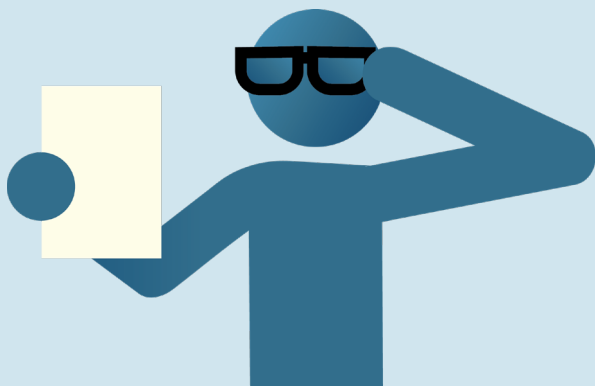
Any well-designed estate plan will be unique and specific to your family and your assets. Custom drafting takes time. We also have at least two sets of eyes reviewing every estate plan before sending drafts to you. During this time period, you also have time to make adjustments to your estate plan or make final decisions on any pending issues from our initial estate planning meeting.

You will receive a summary of your estate planning decisions to review. In addition, we prepare trust funding documents, which we will discuss further in #8.

**Q:**  
*How long does it take to complete my estate plan?*

**A:**  
*Approximately 5 to 8 weeks*

## 6. Reviewing Your Estate Planning Summary



You will have the opportunity to review your estate planning summary to ensure information being used to draft your documents is accurate. Please verify proper spellings of names, accuracy of addresses and date of births. Confirm that the plan directionally supports your intentions.

## 7. Signing Meeting



The day is here. You have reviewed the estate plan, made any final adjustments, and are ready to sign the estate planning documents.



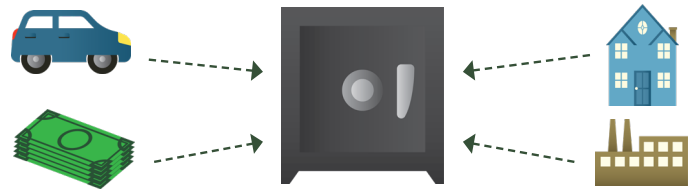
You will need to bring your ID, so that many of the documents can be notarized or witnessed.



After we make copies for our records, we will send you the original estate planning documents, along with a flash drive with your healthcare related documents.

## 8. Funding Your Trust (if applicable)

Just when you thought you were done, in comes the most important part of estate planning: trust funding. This concept is better explained in person, but essentially once your Trust is executed, we need to transfer your assets to your Trust.



This final step is extremely important because, without proper trust funding, your estate plan will be ineffective. We can assist you, if needed, to fund your trust, for a small fee. This is one of the many differences between our firm and other attorneys or online software.



**Surprenant & Beneski, P.C.**  
*Strategic Planning for Your Peace of Mind*

508.690.5773  
[myfamilyestateplanning.com](http://myfamilyestateplanning.com)