

**The 10 most
important questions
you need to ask
before hiring an
estate planning lawyer**

ESTATE PLANS
for **FAMILIES**



Legal Planning for Your Family's Future

The 10 most important questions you need to ask before hiring an estate planning lawyer

The following 10 questions will help you be sure that the well-being of your money, your family and your life are getting the best protection that is available.

1. Do you prepare a comprehensive plan for my kids' care if something happens to me, like the Kids Protection Plan™ 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?
3. Do you have a whole team in place or is it just you? What happens if something happens to you or you retire?
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 or who I am 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 against them or if they are divorced in the future? How often do you build that kind of planning into client's plans?

Knowing the answers to these questions before you engage an estate planning lawyer will ensure you put in place an estate plan for your family that will really work. And give you an Estate Plan that when your family needs it, won't end up as just a pile of worthless paper after you are gone.

How Our Law Firm is Different...

ESTATE PLANS for FAMILIES

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Explaining to you how we're different requires an explanation of what the "traditional" experience with a lawyer is like. If you've worked with a lawyer to prepare estate planning documents for you in the past, this will sound familiar.

During the traditional experience, you'll go in and meet with a lawyer who will oftentimes make things seem very complicated and confusing. You'll have a good idea that the lawyer is smart and seems to know what she's doing, so you'll nod and answer questions, as if you understand everything. Because you want to do the right thing for your family, you'll have the lawyer prepare documents for you and you'll sign the documents, feeling relieved that you've got that taken care of.

You'll take your fancy planning binder home, stick it on a shelf or in a drawer, mark estate planning off on your checklist as DONE and never think about it again.

You might remember your lawyer said something about moving your bank accounts into the trust. So you'll go to the bank, forget what you were supposed to do, call your lawyer's office, get a voicemail, have to leave the bank and wait for a call back, (which takes several hours at least and sometimes days) and by that time, you'll have gotten busy with other things and never get around to moving that bank account.

A few weeks later, you'll get a bill in the mail for \$67.50 for 15 minutes of your lawyer's time for answering a couple of questions. You'll make a mental note – don't call lawyer ever again.

Several years later, you'll refinance your house or sell it and buy a new one and forget that you were supposed to let your lawyer know or make sure you kept the title in the name of the trust.

Your children will get older, making your guardianship choices outdated, but you don't want to call your lawyer because you know you'll get a bill in the mail two weeks later.

You'll hear something about a change in the tax law, but you figure you'd surely get a letter in the mail from your lawyer if it was something that affected you, so you don't worry about it. And, you'd have to dig through boxes to find your trust documents so you could remember your lawyer's name and find her contact information. Who has time for that?

It's not until you become incapacitated or die and your family finds the binder you stuck up on a shelf several years before and never looked at again, that they'll realize your plan is so outdated that it has nothing to do with your life, your assets and the law.

Your family is at a loss. They don't know where to turn or what to do, so they contact the same lawyer you used to prepare the documents, who is as happy as can be to probate your assets, which never made it into the trust.

OUR FIRM HELPS YOU PREPARE FOR LIFE!

What makes our firm different is that we were built with the needs of growing families in mind. We understand you are BUSY, you are growing, you are planning for a life of prosperity and you value ease, convenience and efficiency. You want to know you've made the best decisions for your family and that your plan will work when your loved ones need it most. You want to make sure your children would be taken care of in the best way possible and will be prepared to receive your wealth if anything happens to you.

That is our focus as well. We've developed unique systems to give you the same access to a Personal Family Lawyer as was previously only available to the likes of Bill Gates, Warren Buffet, and Sam Walton so you can have the guidance you need to build and maintain a life of prosperity and wealth.

We encourage communication with our clients. In fact, we've thrown out the time clocks so you never have to be afraid to call with a quick question (or even a not so quick question). Everything we do is billed on a flat-fee basis, agreed to in advance, so there are never any surprises.

We have a whole team to serve you. When you call our office to ask your quick question, you won't have to wait hours or days for a phone call back. You'll get your question answered, right away. And, if you need to schedule a more in-depth legal or strategic call with your personal lawyer, a call will be scheduled when your both available and ready for the call so we can make the very best use of your time and not waste your time by leaving voicemail after voicemail back and forth.

And, we ensure the most important details of your planning are followed through on and your plan continues to work throughout your lifetime.

We have a full time "funding coordinator" to ensure your assets are protected throughout your lifetime and none of your assets will end up going through a long, expensive court process or being lost to the state because they were missed after your death.

We've created unique membership programs to keep your plan up to date year in and year out as well as give you access to our Trusted Team of Legal Experts for guidance on ANY legal or financial matter. One day you will need a lawyer. I don't know why and I don't know when, but when you do, you will be grateful you can call on us and we'll be here to advise you or get you out of a jam.

Lastly, we believe your financial wealth is only about a quarter of your overall "Family Wealth" which is made up of your far more valuable, Intellectual, Spiritual and Human assets – who you are and what's important to you.

Most estate plans are only able to transfer your financial wealth to the next generation. The intangible nature of your much greater wealth makes it difficult to capture and it's most often lost when someone passes. How much do you know about your grandparents values? Their most prized personal possessions? How they felt about you? What they had learned during their lifetime?

If you are like most people, you know very little. But, the wealthiest families capture these assets and pass them along right with their financial wealth. And, that's part of the reason the rich keep getting richer.

We've developed a tool that allows us to pass on your whole Family Wealth, including your Intellectual, Spiritual and Human assets. I can't go into all of the details here, but we'll definitely talk about it when you come in to meet with me.

We look forward to seeing you and caring for your family soon!



Sheera Herrell Esq.

PS – If you think this all sounds expensive, well, you are right and you're wrong. I can guarantee you that if you qualify to meet with a Personal Family Lawyer, that planning is substantially less costly than it would be for your family if you died with a plan that didn't work or if you didn't have a plan in place at all. And, I've never had a single family who believed in this kind of planning and wanted to put it in place for their loved ones leave my office because they couldn't afford it. We've made creative financing available to our clients because we know this planning is the foundation for a life of success!