

Your Estate Planning Experience with Trust Law Counsel

Providing Peace of Mind

Pre-Consultation

During this part of the estate planning process, you will complete our Goal Identification Form and Planning Worksheets. This helps us understand your financial background, your situation, and your needs. We are also happy to work with your referring financial advisor for this information.

(Return 2-3 business days prior to Consultation Meeting.)

Deadline to Return: _____

Consultation Meeting

The initial “interview” meeting with you and any other planning advisors you want to include. Information is gathered during this meeting around your goals, wishes, and assets.

Meeting Date: _____ Time: _____

Design Meeting

Trust Law Counsel shares a recommendation for your personalized estate planning strategy in plain English and with easy-to-understand outlines and diagrams. Together, we will thoroughly discuss how the plan’s design meets your goals. In many cases, upon your wishes, we will also coordinate with your executors, trustees, agents, and other planning professionals to communicate your plan’s design. At this meeting, your fixed fee will be communicated.

Meeting Date: _____ Time: _____

Review and Signing Meeting

Trust Law Counsel will review your actual estate plan documents with you to ensure you understand them and that there are no final changes, as well as ensure they meet your goals and objectives. You will then sign the legal documents to implement your estate plan.

Meeting Date: _____ Time: _____

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For more information on Trust Law Counsel and its practice areas, visit www.TrustLawCounsel.com.

Funding

It is important to update beneficiary designations and titled documents, ensuring the estate plan works effectively and as designed. Trust Law Counsel coordinates with you and your planning professionals to accomplish this.

Family Meeting

Trust Law Counsel will assist you in educating your family members, executors, trustees, and other beneficiaries about your plan, their role, and why your plan is designed as it is. *Note: We take confidentiality very seriously and will not share anything unless you authorize us to.*

TLC Maintenance Program

Life happens so as changes occur with you, your family, and your financial situation, Trust Law Counsel provides ongoing support to ensure your estate plan stays current and up-to-date.

Estate Administration

Estate administration can be complex. Goosmann Trust Law Counsel can efficiently assist you with the tasks involved in probate or Trust administration, making certain the legacy of the loved one who passed away can be fulfilled.

Probate is supervised by the courts. It is the responsibility of the Executor to make sure that the estate is properly and efficiently administered. Because probate involves several steps, we are here to help Executors through the emotional and sometimes difficult process.

A Trust will determine how and when assets are to be passed onto the beneficiaries following the Trust creator's death. The Successor Trustee will be responsible for this. We can guide the Trustee through the various steps involved in this transition, ensuring they have support and that the wishes of the Trust creator are followed.

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A boutique department within Goosmann Law Firm

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