



**NH** LAW  
GROUP

# client welcome guide

estate planning



# about us

## Our Mission

Ensure Clarity, Inclusivity, and No-Nonsense Legal Guidance

Our diverse team of experts provide a wide range of perspectives, capabilities and knowledge to meet all your needs.

Legalese can be intimidating and daunting. ALH works with our clients to empower you to understand the legal process and jargon. We equip you with the knowledge you need to make the educated and informed decisions about your future!





# what we need from you

## 1. CONTACT DETAILS FOR KEY INDIVIDUALS AND INSTITUTIONS

- LIST NAMES AND CONTACT INFORMATION FOR BENEFICIARIES (FAMILY, FRIENDS, ETC.) AND EXECUTORS.
- INCLUDE CONTACT DETAILS FOR YOUR FINANCIAL ADVISOR, BANK, AND OTHER RELEVANT FINANCIAL INSTITUTIONS.

## 2. DETAILED LIST OF CURRENT ASSETS

- ENUMERATE ALL BANK ACCOUNTS, REAL ESTATE PROPERTIES, AND CONTENTS OF SAFE DEPOSIT BOXES.
- DETAIL ALL INVESTMENTS, STOCKS, OUTSTANDING NOTES, INHERITANCES, OWNED BUSINESSES, LIFE INSURANCE POLICIES, AND ANY LIABILITIES.

## 3. ESTATE PLANNING DOCUMENTS AND AGREEMENTS

- PROVIDE COPIES OF EXISTING ESTATE PLANNING DOCUMENTS, SUCH AS WILLS, TRUSTS, AND POWERS OF ATTORNEY.
- INCLUDE ANY PRENUPTIAL AND POST-NUPTIAL AGREEMENTS AFFECTING YOUR ESTATE.
- GATHER RELATED DOCUMENTS LIKE OPERATING AGREEMENTS, TRUST DOCUMENTS, AND OTHER PERTINENT CONTRACTS.

# types of plans

1. **COMPREHENSIVE** – THIS PLAN INCLUDES TIME WITH THE ATTORNEY TO DISCUSS AVOIDING PROBATE, DISINHERITING INDIVIDUALS, OR HANDLING INDIVIDUALS LIKELY TO CONTEST YOUR WISHES AND ENSURING BENEFICIARIES RECEIVE A STEP UP IN BASIS FOR TAXES.
2. **EXHAUSTIVE** – THIS PLAN IS FOR THOSE INDIVIDUALS WHO HAVE COMPLICATED FINANCIALS (I.E. HIGH NET WORTH OR MULTIPLE BUSINESSES) OR DEMAND A TRUST.

# timeline

1

## initial consultation

This is the first step where you discuss your specific concerns with us. During this meeting, we will also recommend documents/steps we can do to address your estate planning needs.

*timeframe: depends on availability – maybe a day to 10 weeks after your appointment setting*

2

## retaining us

After the initial consultation, you'll be required to sign the engagement letter. sign-up through the clio client portal, and pay the retainer fee. Once this is all done, we can begin working on your case.

*timeframe: engagement letter will expire after 30 days and retainer fee will be due once you've sign the letter*

3

## compile information

Before diving into the process, you need to gather all necessary information. This includes contact details and information about your beneficiaries and executors, and a comprehensive list of your assets.

*timeframe: depends on how fast you gather your information – optimal time is a week before or after your consultation*

4

## questionnaire

You will be provided with an online questionnaire form that you need to fill out. This form captures all the essential details needed for drafting your estate plan.

*timeframe: depends on how fast you finish the questionnaire – optimal time is a week after your consultation*

# timeline

5

## drafting documents

Based on the information you've provided in the questionnaire, we will draft your estate plan. This draft is a preliminary version that outlines how your estate will be managed and distributed.

*timeframe: one week after confirmed completion of questionnaire*

6

## draft review

After receiving the draft, you will need to review it thoroughly. You may provide feedback or request revisions if there are specific details you want to change or add.

*timeframe: depends how fast you can review and assess your form. small revisions can be done within 1-3 days while bigger ones can be done within a week.*

7

## finalize drafts

Once you're satisfied with the draft and it meets your standards, you can proceed to the next step. If you require further discussion or clarification, you may:

8

## schedule appointment

- a. Schedule a consultation: this helps address the questions you have towards your estate plan drafts. it may include topics like tax treatment and probate avoidance strategies.
- b. Scheduling the in-person signing: The final step involves scheduling an appointment for the in-person signing of your estate plan documents.

*timeframe: depends on availability – maybe a day to 10 weeks after your appointment setting*



# deliverables

- FINANCIAL POWER OF ATTORNEY
- HEALTHCARE POWER OF ATTORNEY
- LIVING WILL
- HIPAA RELEASE
- PERSONAL FINANCIAL STATEMENT
- HOSPITAL VISITATION AUTHORIZATION
- ASSET DISTRIBUTION LIST
- COMPLIMENTARY NOTARY SERVICES INCLUDED
- OPTIONAL DOCUMENTS:
  1. BMV ORGAN DONOR REGISTRY ENROLLMENT FORM
  2. OSU ANATOMICAL BEQUEATHAL FORM
  3. NOMINATION OF GUARDIAN
  4. REAL ESTATE TRANSFERS: UP TO 3 TRANSFER ON DEATH AFFIDAVITS (RECORDING FEES INCLUDED).
  5. VEHICLE TRANSFERS: UP TO 4 TRANSFER ON DEATH DESIGNATIONS WITH BMV (RECORDING FEES NOT INCLUDED).



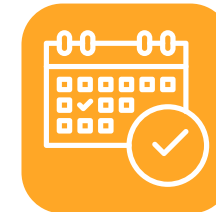




# thank you!



CLIO CLIENT  
PORTAL



BOOK TO  
SCHEDULE AN  
APPOINTMENT



START  
QUESTIONNAIRE  
FORM

If you have any more questions or concerns,  
please click the icons above to contact us.

you may also reach us through the following

alternative channels:

email: [alh@alhlaw.com](mailto:alh@alhlaw.com)

phone: (614)440-1395

