
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.

our standard 3-month completion window

WE COMPLETE MOST ESTATE PLANS WITHIN 90 DAYS OF SIGNING YOUR ENGAGEMENT LETTER.

THIS KEEPS YOUR MATTER MOVING AND PREVENTS DOCUMENTS FROM SITTING UNFINISHED.

THAT SAID, TIMING CAN VARY DEPENDING ON COMPLEXITY AND HOW QUICKLY YOU PROVIDE INFORMATION AND FEEDBACK.

timeline

month 1: information & questionnaire completion

1

initial consultation

We meet to understand your goals, concerns, family structure, and assets. We recommend the documents and strategies that fit your situation.

Timing: Based on availability (typically within 1 day to 10 weeks of scheduling).

2

retaining us

After your consultation, you will:

- Sign the engagement letter through the Clio Client Portal
- Pay the required retainer

The engagement letter expires after 14 days if not signed. The retainer is due upon signing. Work does not begin until both are completed.

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 one month after your consultation

timeline

month 2: drafting & review

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 month 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 1-2 week.

month 3: signing and completion

7 finalize documents

Once revisions are complete and you approve the drafts, we prepare final signing copies.

8 schedule appointment

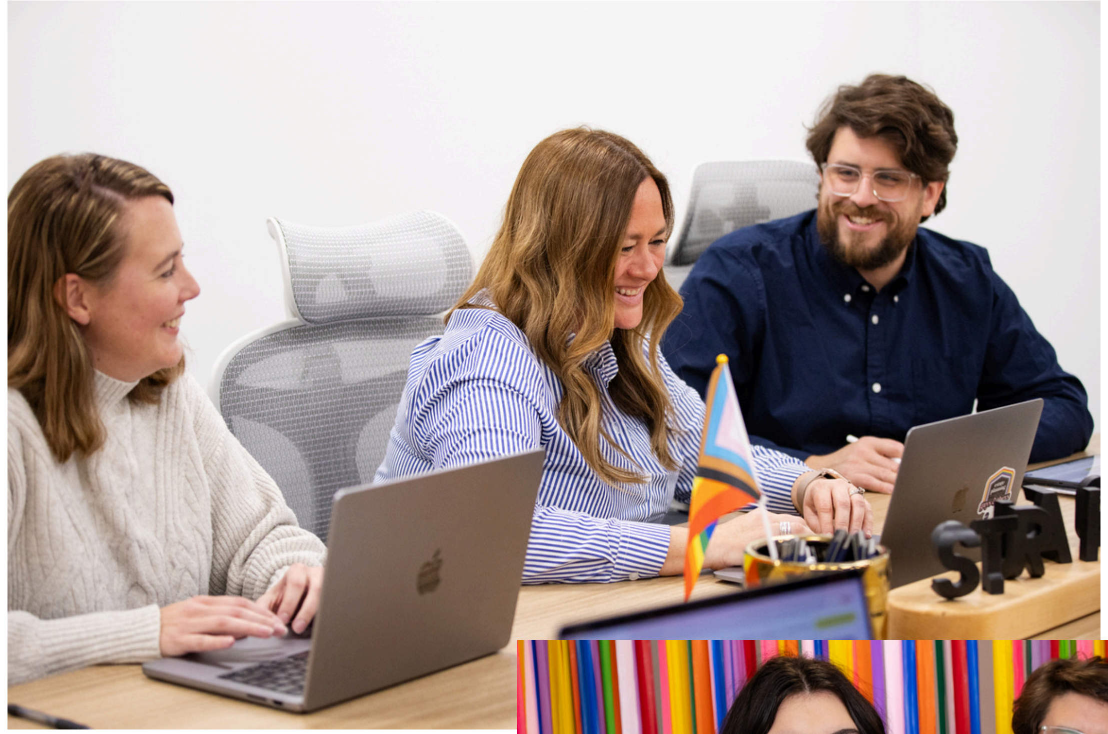
Scheduling the in-person signing: The final step involves scheduling an appointment for the in-person signing of your estate plan documents.

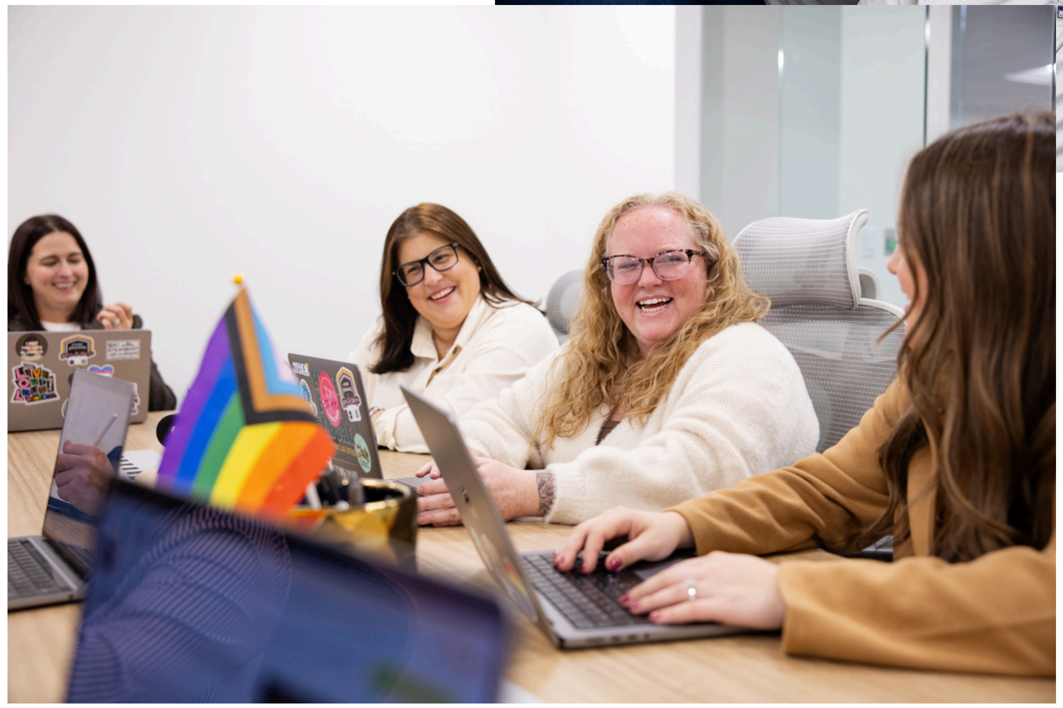
timeframe: depends on availability - maybe a day to 10 weeks after your appointment setting

deliverables

- FINANCIAL POWER OF ATTORNEY
- HEALTHCARE POWER OF ATTORNEY
- LIVING WILL
- HIPAA RELEASE
- PERSONAL FINANCIAL STATEMENT
- HOSPITAL VISTATION 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

phone: (614)440-1395

ALH LAW GROUP