

Process Podcast

Chapter 4 – Document Builder

The fourth stage in our program is the Document Builder. This is the time and we spend to construct your legal documents, whether they're wills trusts, or both the powers of attorney, the health care surrogates, the living wills, the pre-need guardians.

We're going to also supply you with an easy to understand flowchart, and a summary where the trusts are more complicated. This way, you can read through all of the documents prior to our review of the documents with you.

Now, keep in mind, the Document Builder phase is just initially a first draft and because we operate on fixed fees, it doesn't matter how much time we spend with you, reviewing the drafts or changing the drafts based upon your thoughts once we have things down in writing, because our ultimate goal is to provide you comfort and clarity.

So the Document Builder phase is the phase where we actually construct the documents based upon the first three phases of the program, and we review those documents with you, and we won't let you sign those documents until you're satisfied that it meets with your intent.