Process Podcast

Chapter 1 - Organizer

The family estate legacy program is our unique trademarked seven step process that we use to help you design the best estate plan for you and your loved ones. It all starts with a client organizer. Prior to your initial consultation, we're going to send you a client organizer that we ask that you complete thoroughly and return to us at least two business days prior to that consultation. This information is very important to us as we will not be able to provide meaningful advice to you without knowing for example, the types of assets that you own, how you own them and their relative values.

Now rest assured our fees are not dependent upon your net worth. Instead, our fees will be fixed, and they will be quoted to you and you'll be able to, to select the fee that you want to pay based upon the level of planning that you desire. So please do get us this client organizer back to us, along with copies of your current estate planning documents if you have any. Prior to that initial consultation, we're going to spend the time to review all of this so we're prepared to give you the best advice that we can during your initial consultation.