

### **ESTATE & ELDER LAW**

Protect Your Family. Preserve Your Legacy



## **Team Legacy**

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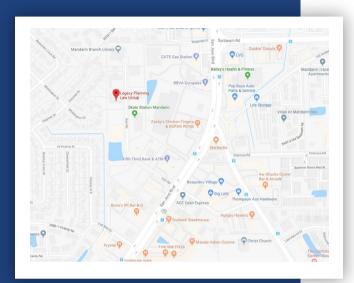
# Thank you for scheduling an Initial Consultation with Legacy Planning Law Group.

We look forward to visiting with you in person. We want to take this opportunity to introduce our firm. We hope you find the following information helpful. Should you have any questions before your consultation, please do not hesitate to contact our office. We look forward to helping you *Protect Your Family and Preserve Your Legacy*.

Warm Regards,

Team Legacy





# We Are Conveniently Located at:

3430 Kori Road, Suite 4 Jacksonville, FL 32257 (904) 880-5554

# DRIVING DIRECTIONS

From North Jacksonville, Southside, the Beaches and St. Johns County (except NW St. Johns County):

- Take 295 North to Exit 5 (San Jose Blvd.).
- Go north on San Jose Blvd. 1.8 miles.
- Turn left (heading west) on Kori Road.
- Drive 0.2 miles on Kori Road.
- Our office is on the left.

### From Mandarin and NW St. Johns County:

- Go north on San Jose Blvd. 1.8 miles north of I-295.
- Turn left (heading west) on Kori Road.
- Drive 0.2 miles on Kori Road.
- Our office is on the left.

### From Orange Park, Clay County, the Westside and Ortega:

- Take the Buckman Bridge south to Exit 5 (San Jose Blvd.).
- Go north on San Jose Blvd. 1.8 miles..
- Turn left (heading west) on Kori Road.
- Drive 0.2 miles on Kori Road.
- Our office is on the left.

#### From points north of Mandarin:

- Go south on San Jose Blvd.
- Turn right (heading west) on Kori Road.
- Drive 0.2 miles on Kori Road.
- Our office is on the left.



### WHAT TO EXPECT

When you arrive at our office for your Initial Consultation, you will be greeted by one of our friendly team members who will offer you a refreshment from our generous assortment of coffees and teas. Bottled water is an option as well.

We strive to make our office a warm and friendly place. From the reception area to the conference room, our office is designed to put you at ease and be an extension of your home. Our office also is wheelchair-friendly, including our restroom. We respect that your time is valuable, so we will not keep you waiting past the appointed time.



#### The Initial Consultation

We have set aside 1:30 hours for your Initial Consultation. This time will be devoted to conversations about you and your family and about your goals and objectives so we can help you *Protect Your Family and Preserve Your Legacy*. In order to do the most comprehensive planning possible, we need to know about you. To accomplish that, we must go beyond simply learning who gets what.

Once we fully understand what you want and need, we will design our legal solutions to carry out your plan. Although the legal aspects of estate planning can be complex, it is our job to explain these concepts in a way that makes them understandable. We strive to provide comfort and clarity.

If you choose to retain our firm at the Initial Consultation, we will finalize the details of your estate plan. We will also schedule the signing and execution of your estate plan, what we call the "Signing Ceremony". Please bring your calendar. The Signing Ceremony may be the occasion to include your successor trustees or executor. While loved ones need not know the dollars involved with your estate, we'll help them make sense of your plan.

Please see the "Price & Payment" section of this packet for more information. It is important that you bring your checkbook to the Initial Consultation because we will ask for a partial payment at that time in order to retain us. We also accept credit cards.

At the Initial Consultation, we will also ask you to sign our "Terms of Service" agreement to retain us. This agreement outlines the scope of our work and the duties and responsibilities to you as our legal client.

We will also discuss "next steps" and how we will proceed through the document review and signature process. Additionally, please bring any prior estate plan you have already executed to the Initial Consultation.





#### **After the Initial Consultation**

In the days between the Initial Consultation and the Signing Ceremony, we will be busy creating your planning documents. If we have any questions during this time, we will reach out to you. This is also a great opportunity for you to follow up with us if you have any further questions or additions to your plan.

We will be sending you certain of the legal documents for your review and comment. These will include a summary of your plan and a list of the important people in your life who you wish to play a role in your estate plan. We urge you to verify the accuracy of this information. We also will follow up with you and make our attorneys available to answer any questions you have.



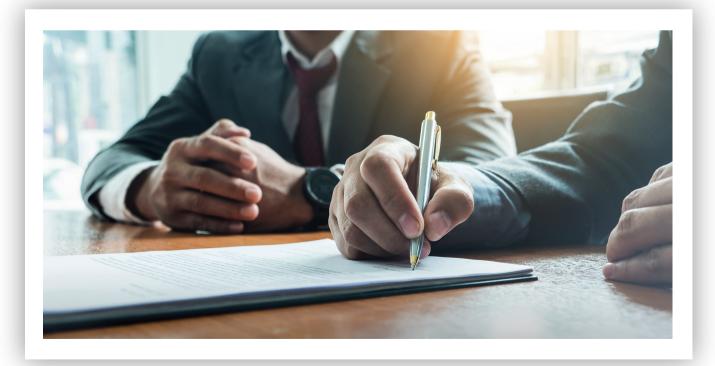


#### **The Signing Ceremony**

This is where your estate plan comes into legal effect. The purpose of the Signing Ceremony is to review and execute your estate plan. We will also set aside one hour for this meeting.

If your estate plan is based on a trust and you retain us to align your assets with your trust (which we highly recommend), we will discuss some important paperwork that we require.

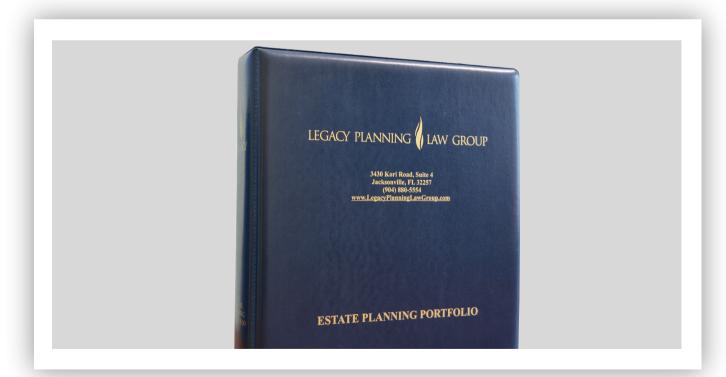
The alignment of assets with your trust is a vital part of the success of the plan, which is why we strongly encourage you to get our help with this critical function. Without our assistance, financial institutions might thwart the plan we have developed for you.





#### **The Binder Delivery Meeting**

Several weeks after the Signing Ceremony, we will invite you to come into the office for our Binder Delivery meeting. This is where we personally deliver your executed estate plan documents and talk about our relationship moving forward. You are able to ask any remaining questions you have.





### PRICE & PAYMENT

From time to time, clients ask us for pricing information. Unfortunately, this is a very difficult question to answer. Every plan we create is based on your individual set of circumstances. We do not do "cookie cutter" planning and there is no "one-size-fits-all".

A multitude of considerations are taken into account when price is calculated, including the level of complexity of your plan, the amount of work your planning involves, and the value we deliver. By analogy, if you want us to build a house for you, we might be able to tell you what a small starter home would cost but could not tell you what the house of your dreams would cost without knowing what your dreams and goals are.

We can commit to you that should you retain our firm, you will know the total out-the-door price. No hidden tricks. We will ask that you invest half of the price up front and the other half at the Signing Ceremony.



### LEAVE US A REVIEW

We commit to providing you an outstanding client experience you will not find anywhere else at any price. When we complete the planning, we will kindly ask you to leave us a Google review. A good review is a great way for others to learn about your positive experience.

We will also ask you not to keep us a secret. Telling others about us is the best compliment you can give.



