ECKERT BYRNE LLC
A LIFE AND LEGACY PLANNING LAW FIRM

ESTATE PLANNING GUIDELINE

Make sure your Personal Information Form (PIF) is complete!

Initial Client Meeting
(1 hour)

- Gather client's personal information
- Identify client's needs and goals
- Review Estate Planning tools
- Make recommendations
- Review Firm's process & fees

Review "How to Become a Client" sheet from your initial meeting packet!

Engagement

A design meeting may not occur without a signed engagement letter

Design Meeting
(2 hours)

- Collect asset and financial information from client
- Attorney confirms receipt of asset and financial information
- Attorney guides client through the interactive design process
- Attorney counsels client through Estate Planning options

Flowchart MUST be reviewed by Client BEFORE review call!

Flowchart Review Call
(30-45 min)

- Review flowchart design diagram
- Confirm names, appointments, and distribution decisions

Confirmation of decisions MUST be given before delivery!

Delivery Meeting
(1-2 hours)

- Review Estate Planning documents with client
- Provide funding recommendations & instructions

Sign your documents and experience peace of mind!

Client Maintenance

- Optional enrollment in *Annual Maintenance Program* for all clients
- Ongoing *Legal Checkups* for all clients

Per pricing & engagement, Flowchart Review Calls are included in Spruce, Willow and Sequoia plans only.

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