

# A Message From Your Friendly Estate Planning Paralegals

Let's face it, just thinking about death, let alone **planning** for your death, might not be at the top of your list for exciting things to do in 2020. However, now more than ever, it is important to have an estate plan in place. Your friendly Chambliss estate planning paralegals want you to know that we enjoy getting to know our clients, and we care about you. We take our job very seriously, and we understand how personal and important your estate plan and your family are. We want you to feel comfortable as we work together on such important personal matters. During the process, we hope to form long-lasting relationships with our clients, so that you feel like you always have a contact person to go to if you ever have any questions or need to make changes to your estate plan. We are fiercely loyal and committed to our clients.

## **Things to consider if you're new to estate planning or it's been a while since you worked on your plan:**

- You may be thinking, "I don't have enough money or personal property to warrant having an estate plan." We are here to tell you that an estate plan, no matter how big or how small, is important in order to carry out your wishes after your death. It's not all about financial planning either. You may want to include a non-family member as part of your estate plan, or, on the other hand, you may want to exclude a family member. Perhaps you have a pet and want to ensure it is taken care of after your death. There are many reasons for having an estate plan tailored to meet your financial and personal goals.
- You may feel intimidated about meeting with an attorney. Believe it or not, attorneys are people, too. And, they even have a sense of humor! Our entire team (attorneys included) is made up of caring individuals with families of their own who understand how deeply personal and important estate planning is. We each want you to know that you are important to us and that we are here to help you navigate this process and come out comforted in the fact that you have planned for you and your loved ones' future.

## **To help you understand the estate planning process, here is a brief overview:**

1. You will be sent a personal questionnaire and a financial questionnaire, which we will request that you complete and return to us about a week prior to your meeting.
2. Once we receive your completed questionnaires, your estate planning paralegal will review the information and prepare the documents necessary for your initial meeting. If needed, we may contact you for clarification or to request additional information. We realize we might come across as persistent information gatherers, but this is all for a good reason! Our goal is to make your initial appointment with our team as productive and cost-effective as possible, and in order to do that, we need as much information as possible in the questionnaires. This information helps our attorneys prepare for the meeting and begin to formulate what type of estate plan is recommended for your situation. A lot of money can be saved during this initial phase by working with your paralegal so that you are not paying the attorney to gather this information in the initial meeting.
3. You will meet with your attorney, review the information you have provided, and together, will discuss an estate plan specific to your family's needs and wants. If we have gathered enough information, you will most likely be able to go ahead and sign your new incapacity documents (powers of attorney and advance directive for health care). The more that can be accomplished in the initial meeting, the more time and money you save!
4. After the initial meeting with your attorney, our team will meet to discuss your wishes and outline the documents needed to implement your estate plan.
5. We will then contact you to schedule a convenient time to sign your documents. Drafts of your new documents will be sent to you about a week before your scheduled signing meeting in order to give you ample time to review them. We will also ask you to contact us with any questions or changes that you might have so that, if possible, they can be addressed before your signing meeting. This is a step that will save you time and money!

6. After your documents have been signed, your paralegal will assist you in order to fully implement your estate plan (i.e., restructuring assets, updating account beneficiary designations, etc.). Most people, and sometimes even other law firms, let this phase of completing the estate plan fall to the wayside. We realize that after the documents are signed, you feel relieved and ready to put estate planning in the back of your mind again; however, this can be a huge mistake. When you spend time, thoughtful consideration, and financial resources on an estate plan, you want to make sure it is implemented properly. Otherwise, it could end up costing you more money at the probate level, causing unnecessary stress on your family and defeating the purpose of your intentional preparation.

Our Chambliss estate planning team is on your side and wants to make sure this secondary work has been completed. Please keep in touch with us throughout the process. Once finished, you can then take a deep breath, feel proud of all you have accomplished, and put the estate plan in the back of your mind (until it's time for a review anyway)!

Our goal is to form long-lasting relationships with our clients. To do this, we will work with you to be as efficient as possible, so that you are happy with our services, which in turn makes us happy!

*If you're interested in starting or updating your plan today, please contact [Dana Perry](#) or a member of our [estate planning team](#).*

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