

# ESTATE PLANNING CHECKLIST

THE LAW OFFICE OF JEREMY D. ALLEN, PLLC

The Law Office of Jeremy D. Allen provides comprehensive estate planning services. We take it step-by-step to ensure that you are getting everything you need. It is our goal to make it feel simple but build you an estate plan that is anything but.

## ✓ STEP ONE | CONSULTATION

Let's chat! I'll explain my services, the purpose of the included documents, and listen to your needs. We'll come up with a plan to get you on the path to sleeping easier knowing your estate is cared for.

## ✓ STEP TWO | ENGAGEMENT

Once we've decided on how to proceed with your plan, you'll sign an engagement agreement and pay your deposit.

## ✓ STEP THREE | DETAILS

We provide you a questionnaire to help guide your thinking. Don't worry, we will help you until you are comfortable with all of your decisions and details.

## ✓ STEP FOUR | DRAFTING

We will draft all of your documents and revise them until you are happy.

## ✓ STEP FIVE | SIGNING

### In Person (preferred)

We will gather together with two appropriate witnesses and a notary to execute your documents.

### Remotely

We will send you completed documents and advise you how to gather with two appropriate witnesses and a notary. Ideally, we will video-conference into your signing (or at least telephone in) to guide you through the execution of your documents.

## ✓ STEP SIX | YOU DID IT!

Once your documents are signed, you're done! We will advise you how to keep your documents safe and accessible.

We will keep electronic copies of your signed final documents in your secure online client portal.

If you ever need a copy or to make changes, we are here for you!

210.686.4482

[WWW.ALLEN-LEGAL.COM](http://WWW.ALLEN-LEGAL.COM)