

Learn More About the Estate Planning Process

1. Initial Consultation

The estate planning process begins before your initial consultation, as you consider the Estate Plan Questionnaire. The questionnaire will help you prepare for the meeting. More importantly, by sharing your background information and preliminary thoughts with Ms. Davidson, you enable her to focus on your particular situation and which estate planning options will best accomplish your goals.

2. Form the Attorney-Client Relationship

If you would like to work with the Law Office of Nicole A. Davidson, and Ms. Davidson agrees to prepare your estate plan, the attorney-client relationship begins when the attorney and client sign a Legal Services Agreement. A Legal Services Agreement is a contract that identifies the attorney and client, lists the services that the attorney will and will not provide, and explains how the client will pay the attorney for those services.

3. How Much Does it Cost?

Most clients pay a predetermined fee for their estate plan. Some additional costs may apply, and Ms. Davidson will give you her best estimate of those costs before you hire her. Other clients prefer to pay an hourly rate for unrestricted and highly personalized service.

If you hire the Law Office of Nicole A. Davidson to prepare your estate plan for a fixed fee, one half of that fee is payable when you sign the Legal Services Agreement. Only checks or money orders are accepted, and they should be made payable to “Nicole A. Davidson, Esq.”

4. How Long Will it Take?

Ms. Davidson is sensitive to your needs. You should advise her of your time frame, and she will advise you of her time commitments. In most non-emergency cases, Ms. Davidson will draft your estate plan documents within two weeks and email or mail them to you for review.

Within two weeks of your receiving the draft documents, Ms. Davidson will ask you to call or email her to clear up any misunderstandings, clarify provisions, or make other changes. Then you will schedule a final review and signing meeting. For signings at your home or office, please be prepared to ask an adult friend or neighbor (who is not listed in your estate plan) to witness your Will.

The estate planning process is usually completed within 4-6 weeks. However, the process may take longer for some revocable living trusts, for example when lenders are involved, or when a large number of accounts at various institutions need to be retitled.

5. Who Keeps My Original Documents?

The Law Office of Nicole A. Davidson will retain a copy of your estate plan. The original documents will be returned to you and should be kept in a safe place, such as a fire-resistant home safe or bank safe deposit box.