



10 Questions to Ask Before Hiring an Estate Planning Lawyer

To help you plan for the well-being of your family, your life and your money, be sure to ask the following 10 questions before you engage an estate planning lawyer.

1. What is your education and experience?
2. What areas of law does your firm handle? Does your practice focus on estate planning?
3. What happens when things change in my life? Do you notify me about changes in the law?
4. Does my planning fee include a regular review of my plan? What if I want to make changes to my plan?
5. Are all of your fees flat? What about for ongoing work after the initial completion of my estate plan documents? What happens when I call with legal questions after my planning documents were completed? What if the questions are about something other than my estate plan?
6. Can you assist me with both simple and advanced estate planning? Can you help me evaluate tools to minimize my estate taxation and protect the wealth for which I have worked so hard?
7. Do you make sure my assets are titled in the right way? How?
8. Can you structure my estate plan so that whatever I leave to my kids will be protected from a lawsuit against them or if they are divorced in the future? How often do you build that kind of planning into clients' plans?
9. Do you prepare a comprehensive plan for my kids' care if something happens to me that names short and long-term guardians and gives specific instructions to all of the guardians and my caregivers? What about an ID card for my wallet listing the short-term guardians with their contact information?
10. Do you have a whole team in place or is it just you? What happens if something happens to you or you retire? What happens if I need to get a quick question answered and you are not available?

Knowing the answers to these questions before you engage an estate planning lawyer will ensure you put in place an estate plan for your family that will really work when your family needs it most.

Securing Your Family's FutureSM

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