



Welcome to First Coast Legacy Law!

Let me start by saying thank you for considering us! Working with an attorney on any matter can feel overwhelming; and let's be honest, most people don't feel comfortable in their initial interaction with us. I hope you find this experience refreshingly different and even life giving!

In creating a culture of honesty, integrity, and trust, we want to provide you with the details you need to understand the essentials of estate planning and what your experience with our team entails. This packet covers wills, powers of attorney, health care surrogates, and revocable living trusts.

Our Process from Start to Finish

- 1. Intake Forms.** Before scheduling a consultation, we ask that you fill out our intake checklist, which we will provide to you. In order to identify the appropriate estate plan for your unique needs, we need to identify your family make-up, what types of assets you have and how they are titled, as well as your desires for caring for minor children. Once we have this information, you can call our office or request a consultation through our website, www.firstcoastlegacy.com.
- 2. Initial Consultation.** During your initial consultation you can share your desires, concerns, and any questions you have. Heather will have pre-read your intake so you can focus on the issues or concerns that matter most to you. Together, you will discuss the documents needed to create the estate plan that best suits your family's needs and desires. At the end of the consultation, we will quote a flat fee based on the complexity of your estate plan.
- 3. Preparing the Documents.** In order to retain our services, we will send you an Engagement Agreement that explains the services and respective fee previously quoted. When the engagement agreement is signed, Heather will begin drafting your documents. Depending on our case load, we aim to have your documents drafted and available for review no later than three weeks from the date we receive the Engagement Agreement.

4. **Client Review.** We will deliver your drafts to you via email, unless you prefer to have them mailed or printed for pick-up. If you have questions, we can schedule a follow-up appointment via phone or in-person. Once you are satisfied with your documents, we will schedule a time for you to come to the office and sign your documents.
5. **Signing Ceremony.** Because the documents have been reviewed in advance, the signing ceremony typically takes less than thirty (30) minutes to complete. We will provide the notary and two witnesses needed to complete the formal signing.
6. **Delivery.** After you have signed your original documents, we will make an electronic copy of the documents and then bind the originals. Your completed estate plan will include the originals, a letter from our office with a summary of what the documents contain and instructions for next steps. Your binder will come with a checklist for your loved ones to utilize to identify your important financial information after you pass as well as in addition to spaces for you to identify certain subscriptions, accounts, and heirlooms. We aim to have the binder available for pick-up within one (1) week from the date of signing.

Estate Planning Services (with starting prices)

Will Package: (starting prices - \$1,500 for individual and \$2,500 for couple) documents and services include:

- **Last Will and Testament:** Identifies to whom and how you want your assets distributed, who will manage the administration of your estate after your death (personal representative), and who will care for your minor children. Wills are subject to probate.
- **Personal Property Memorandum (PPM):** A separate itemized list of special personal assets (heirlooms) and with corresponding beneficiaries. The PPM is referenced by the will, but not specifically included in it, so you don't have to update your entire will if you change your mind about who your diamonds or coin collection goes to.
- **Durable Power of Attorney:** Identifies a person you designate to manage your finances (access bank accounts, communicate with social security, pay bills, etc.) in the event you are unable to take these actions on your own.
- **Health Care Surrogate:** Identifies a person you designate to receive medical information about you and make medical or healthcare decisions on your behalf if you are unable to meaningfully communicate your desires.

- Living Will: Statement about your desire to withdrawal or withhold life-prolonging procedures if you are incapacitated and have a terminal condition, an end-stage condition, or are in a persistent vegetative state and there is no reasonable medical probability of recovery.

Revocable Living Trust Package: (starting prices - \$2,500 for individual and \$3,500 for couples) documents include and services include:

- Revocable Living Trust: Allows you to control your assets and how they are distributed both during life and after death. Provides more specific options for how and when assets are transferred to the beneficiaries and avoids probate.
- Certificate of Trust: Proof of the trust's existence and the trustee's authority to act on behalf of the trust. This document can be used by the trustee when performing trustee responsibilities without needing to carry around the entire trust document.
- Pour-over Will: Directs all assets outside of the trust at the time of death, into the trust for distribution under the trust terms. This often occurs when a new bank account or real estate is acquired and not transferred into the name of the trust.
- Personal Property Memorandum (PPM): A separate itemized list of special personal assets (heirlooms) and with corresponding beneficiaries. The PPM is referenced by the pour-over will, but not specifically included in it, so you don't have to update your will or amend the trust if you change your mind about who your vintage earrings or baseball collection goes to.
- Durable Power of Attorney: Identifies a person you designate to manage your finances (access bank accounts, communicate with social security, pay bills, etc.) in the event you are unable to take these actions on your own.
- Health Care Surrogate: Identifies a person you designate to receive medical information about you and make medical or healthcare decisions on your behalf if you are unable to meaningfully communicate your desires.
- Living Will: Statement about your desire to withdrawal or withhold life-prolonging procedures if you are incapacitated and have a terminal condition, an end-stage condition, or are in a persistent vegetative state and there is no reasonable medical probability of recovery.

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- Personal Property Affidavit: Identifies any personal property intended to go into the trust.
- Quit Claim Deed: We will prepare and record one Quit Claim Deed to transfer title of your real property into your trust name.

Each estate plan comes with a binder, a letter from the firm with instructions for your loved ones, and a checklist to assist them after you have passed. There is no better way to leave a loved one than to give them peace of mind knowing you have already prepared it all.

If you have any questions, please do not hesitate to contact our office. We look forward to meeting you soon!

Very Respectfully,

Heather M. Houseal

Heather M. Houseal
Attorney at Law