FIRST COAST LEGACY LAW

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. I hope you find this experience refreshingly different, 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.** Once you have scheduled your consultation, we will provide you with an intake checklist to fill out prior to your scheduled appointment, which informs us of your family make-up, asset types, and current estate planning needs. This information allows us to make efficient use of our time together and helps us develop tailored strategies for your needs.

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. To make this as convenient as possible, we offer flexibility through virtual appointments, in-home appointments or at our office.

3. **Preparing the Documents**. To retain our services, we will send you an Engagement Agreement that explains the services and respective fee. Once signed, Heather will begin drafting your documents. We aim to have your documents 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 a physical copy. If you have questions, we can schedule a follow-up appointment via phone or in-person.

5. **Signing Ceremony**. Because the documents have been reviewed in advance, the signing ceremony typically takes about thirty (30) minutes to complete, unless edits are required or you have additional questions. 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 and a binder containing (1) copies of the documents, (2) a letter from our office to your Personal Representative, (3) additional tabs for including or listing important information, such as banking information, life insurance information, internet subscriptions and identification of specific 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 price - $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 price - $2,800 for individual and $3,800 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.
- 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