FRANCO LAW FIRM P.C.

Legacy Planning Process

1

INITIAL INQUIRY

This is when you reach out to us to let us know you are interested in having us help your with Legacy planning!

2

INTRO CALL WITH CLIENT SERVICES DIRECTOR

We introduce ourselves to you, answer any initial questions, and let you know what you can expect from this process.

3

QUESTIONNAIRE

We will send you an intake form and some details about our firm.

4

CONSULTATION/REVIEW CALL

You will have a call with an attorney to discuss and design the best plan to meet your needs. You will then have the opportunity to choose a design package for your estate plan.

5

ENGAGEMENT

You will receive an "Engagement Letter" to hire us and an invoice. Once the engagement letter has been signed, and the invoice has been paid, we will proceed with your matter.

6

DRAFTING YOUR DOCUMENTS

You will receive an initial draft of your plan design within 2 weeks of engagement.

7

REVISION OF DRAFT DESIGN

After you have reviewed your draft plan design, you can let us know if any revisions are needed.

8

FINAL PLAN DESIGN

We will schedule a time to review and sign your finalized documents.

9

SIGNING CEREMONY

We will reach out to you to schedule a day and time to come to the office and meet with the attorney to sign your documents. Depending on the type of document you are signing, we may also need you to bring a witness.

10

YOU DID IT!

Alas, your documents are finalized, and you now have the legacy planning documents that you need!