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## Estate Planning - What to Expect When Working with HKH Elder Law Our "Six Step Estate Planning Process"

1. **First Contact-** You and our staff will make an appointment with one of our attorneys for a consultation. The first 30 minutes will be free of charge. Once you have made an appointment, we will send you a short form to complete. The form will help you consider your wishes and what questions you may have for the attorney.
2. **Meeting(s) with Attorney-** There is no need to be completely settled on your wishes and plans, that is what the meeting with the attorney is for. During that time, you and the attorney will have a discussion and work towards developing the plan that suits you. This discussion is very important as it will help the attorney understand you and your wishes, and help you consider things you may not have thought about.
3. **Drafting-** Once we have a good understanding of your wishes and we have addressed your concerns; we will begin drafting your plan. At that time, we will be able to set up a timeline for the next steps, normally within a few weeks. It will be up to you to decide if you wish to receive drafts in advance of signing. At this point we may provide you with educational materials, especially for trusts, as we believe it is important for you to understand the benefits of your documents.
4. **Signing Meeting-** Most of the time the meeting will take place in our office, with you in person to review and execute your full estate plan. We must do this in person in order to assure the legal process is followed. We understand there are times when it may be necessary for us to travel to you.
5. **Document Delivery-** After you execute your documents with us we will scan them into our system and keep a digital copy. Normally, this will only take about 15 minutes while you wait for your original documents. We will deliver all original paper documents to you unless we make other arrangements together. We also provide you with a set of copies, an emergency card and, if you wish, a link for the digital copies. However, we ask you to request the digital copies early on as we will eventually close the matter and do not maintain them indefinitely.
6. **Follow-up-** For most trust plans and occasionally with basic will plans, we may have some additional work to do beyond the five steps. That may include activities like recording a deed or following up with an out-of-state attorney.

**Estate Planning Fees:** For most of our estate planning work we are able to offer flat fees. We are normally able to answer your question, “What will my estate plan cost?” and set our fee after we’ve met for the first time and determined a course of action. This is because we usually can estimate the amount of time it will take and there should be a few surprises in the planning process.

Still, there are times when the client’s unique circumstances are more complicated, additional research and work is needed, and we are unsure about the scope of time needed. At those times we may create a combined fee, the flat fee for the known work, with an additional allowance for an hourly fee for the unusual work. The client can choose whether to move forward and is usually asked to pay at least one half of the flat fee before we begin drafting.

The flat fee is usually \$1,200 for a basic plan for an individual and \$1,800 for a couple. A Revocable Trust estate plan begins at \$3,600 for an individual and \$5,000 for a couple. If we need to plan for the hourly time above that, we will charge our hourly rate. Clients who choose properly funded trust plans can save their estates many dollars because they avoid the cost of probate.

Once we have completed the steps, we will send you a final letter, so you know the work is complete. We invite all estate planning clients to join our continuing care program. We believe the learning process about your estate plan, and the need to maintain your plan and stay up to date with the changes in laws and practices, is an ongoing one. This is a fee-based program available only to clients who have been through our estate planning process.

**A Final Note:** After your first meeting with us, and as long as you proceed, you become part of our “Family of Clients” and we like to continue to contact you periodically by sending our monthly E-Newsletter, occasional cards or notices of events put on by our office. We want to keep up with you but if you do not wish to hear from us, please let us know and we will honor your wishes.

If you haven’t called us yet, and would like to speak with us about your estate plan, please call us at 727-343-8959 or email us at [info@HKHelderlaw.com](mailto:info@HKHelderlaw.com)