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GUIDELINES FOR OUR MEETING

Thank you for allowing me to assist you in your Estate Planning. I look forward to meeting with you to discuss your planning objectives. To ensure a fruitful time together, the following are a few guidelines for that initial Estate Planning meeting with me:

1. We have enclosed an **Estate Planning Data Sheet** and ask that you take the time to complete the form to the best of your ability. The Data Sheet gives me basic information about you, your family, and assets, so that we might proceed as promptly as possible to the planning of your estate.

   (a) For example, be thinking of who you will choose to serve as your Trustees/Executors, Health Care Agents, and Guardians (of minor children).

   (b) Also, be considering what charities (if any) you want to benefit, as well as how you might want the distribution of your estate to the children/family structured.

   (c) Please gather up any other documents that might be needed, such as copies of deeds, copies of partnership agreements and limited liability company documents, copies of original stock certificates and the next original <u>blank</u> certificate (for small corporations), and copies of Promissory Notes.

2. Allow for a minimum of **2 HOURS** for the meeting.

3. **Please do not bring your minor children**. If you have minor children, make alternate arrangements for them and do not bring them to our meetings. Young children find all of this boring and will distract you during the meeting.

4. Typically, there is no charge for the first planning meeting (unless all that is desired is legal advice). However, we will fully discuss fees for services and documents in that meeting. should you desire to proceed, a retainer will be requested.

Thank you for cooperating with us by following these guidelines. We desire to make the Estate Planning process as simple as possible for you. If you have questions concerning any of these guidelines, please feel free to contact me or my assistant, **Cynthia**, at **(918) 392-1900.**