TUPPER BUTLER LAW

WE KNOW THE POWER OF PLANNING

ESTATE & LONG-TERM CARE PLANNING PROCESS

Following the Power to Plan Legal Consultation and execution of Engagement Agreement with Plan Selection

STEP ONE: Design Meeting

At the Design Meeting, we walk you through various scenarios in an interview carefully structured to uncover your unique priorities and concerns regarding your finances, health, property, and any minor children or other dependents. We prepare you for the meeting with written questions to prompt your thinking in ways you may not have considered before. The Design Meeting is our opportunity to focus on the finer details of your plan design and address your most pressing concerns. We also review your financial information for accuracy to highlight the value of assets you can protect with proper planning.

STEP TWO: Drafting

Armed with details shared in the Design Meeting, we move to Drafting mode, where we create the documents to legally provide you and your loved ones with the guidance, protection, and preservation that comes with the Power of Planning. After drafting, many estate planning and elder law attorneys move from directly to signing documents, but Tupper Butler Law takes a more personal approach with an interim review of your plan documents.

STEP THREE: Plan Review (and Funding Discussion)

Once fully drafted, we send you summaries of each document and highlight areas for additional exploration to discuss during the Plan Review (and Funding Discussion for trust-based plans). At Tupper Butler Law, we want you to understand your plan – without feeling overwhelmed. The Plan Review is an opportunity for you to see the outcome of your choices and confirm the plan we prepare for you aligns with your goals before you sign the final version.

STEP FOUR: Signing and Delivery

The Signing Meeting is a time to celebrate! Thanks to the earlier Plan Review, the actual execution of your legal documents is a less tedious exercise than you may expect. We will explain the nuts and bolts of your plan to your family, fiduciaries, or other trusted helpers if you wish at the Signing Meeting. We then prepare any additional guidance, file relevant deeds on your behalf, and prepare electronic copies of your executed documents for you before providing you with your full plan in a sleek portfolio.

Enjoy the peace of mind that comes with the Power of Planning!