Video Estate Plan Delivery Processes

In response to the 2020 COVID 19 pandemic, Zimmer Law Firm has developed a 6-step Video Meeting Process. This process makes it easy for you to take care of the important business of implementing your estate plan from the comfort and safety of your home.

This process is similar to our pre-COVID 19 process except that meetings are held by online video through an easy to use program called Zoom Meetings. All you need is a desktop computer, laptop computer, or tablet computer with a camera and microphone, and an internet connection. We send you an email with a link to click on to join a Zoom Meeting that we set up We can see and hear each other as if we were in the same room and share documents on screen.

The following describes the steps of the process, which are also explained in the diagram below.

- **Step 1. Personal Consultation.** This is the first step in the process. You can sign an Estate Planning Services Agreement electronically via the internet with a few clicks of your mouse, or in hard copy. You can make your initial retainer payment by check or credit card online through our secure service called LawPay.
- **Step 2. Asset Inventory Meeting.** At the Asset Inventory Meeting, or AIM as we refer to it, you will meet with a paralegal to look over the information about assets that you provide. She will ask clarifying questions as needed, and let you know if there any missing information. This happens about 2 weeks after the Personal Consultation, by a video Zoom Meeting or phone call.
- **Step 3. Plan Review Meeting**. A few days before this meeting, we will send you a link to a secure website to download or view a personalized video we will prepare for you that explains the details of your estate plan and the contents of your Legacy Wealth Planning Portfolio binder. The video runs about an hour. Watching the video prepares you for the Plan Review Meetings. During this video meeting, a paralegal will review and explain your documents just like we would do in a live meeting. The meeting usually takes one to one and a half hours, depending on your questions. You will be able to view your documents onscreen so the paralegal can show you the personalized wording that you directed. Legal documents are not signed until Step 4.

Six-Step Video Meeting Process for Delivering Estate Plans

- **Step 4. Online Signing Meeting**. This is a 5 or 10 minute meeting for the sole purpose of electronically signing your documents. You will see them on screen in digital format. You will click your mouse where we have "tagged" them for you to sign. We remotely notarize your signatures. The digital copies of your documents are automatically emailed to you and our firm. We will print them for you and prepare hard copies for the next meeting, Step 5. As described at Step 6, this starts your 90-day document review period during which we will make requested changes at no cost. You will be protected under your plan in the meantime.

- **Step 5 – Curbside Signing Meeting.** Ohio law requires the signing of a Will to be witnessed by 2 people in the conscious presence of the person making the will. This eliminates electronic will execution. Instead, we will help you execute your will at a "curbside meeting" in the parking lot of our office building while you are in your car. We will provide witnesses. We may also ask you to sign letters of instructions and forms to fund your trust. This process should take about 10 to 15 minutes. While you relax in the car, we will make copies of your will and then deliver your Legacy Wealth Planning Portfolio with all your legal documents to you in your car in a tote bag with a gift.
- **Step 6 – Updates and Communication.** The 90-day free change period begins with the Curbside Signing Meeting. We process your letters of instruction for title changes and beneficiary designations. We will follow up to see if there are issues in funding. Our complimentary support begins, which includes among other things trust reviews and answering questions any time without charge; a 3-year reminder program for trust reviews; unique educational events for clients and family; and a no-charge meeting with your future fiduciaries who will act for you after your death or incapacitation. We offer printed and online newsletters and an annual social event for clients..

Concerned about the technology? Some people feel uncomfortable with unfamiliar technology. We can walk you through it. Just let us know.