FINDING THE RIGHT ESTATE PLANNING FIRM

Are the Following Services Provided?

SERVICES

- ☐ **FREE** phone calls to the law firm anytime to answer your estate planning questions
- ☐ **FREE** client newsletter on various estate planning topics and subjects relevant to you and your family
- ☐ **FREE** regular review of your estate and financial plan
- ☐ **FREE** consultation with surviving family members during those difficult days after death or incapacity of a loved one
- ☐ **FREE** quote of flat fee for all services offered
- ☐ **FREE** email alerts with news and announcements delivered to clients, their families and friends

ESTATE PLAN

- ☐ Portfolio binder and storage instructions for all documents
- ☐ Recorded explanation of how the plan works for family members
- ☐ Diagram/flow chart showing how the estate plan works
- ☐ "Location List" form for inventory of important papers, etc.
- ☐ List of friends and relatives to be contacted
- ☐ List of key advisors
- ☐ Form for explanation of burial and funeral wishes
- ☐ Memorandum for distributing personal effects and heirlooms
- ☐ Checklist outlining "trust funding" status
- ☐ Health Care documents faxed/emailed to hospitals upon request

CLIENT EDUCATION

- ☐ **FREE** client seminars exclusively for clients and their family's on various estate planning topics
- ☐ **FREE** Long Term Care and Medicaid Planning seminars
- ☐ **FREE** Trust Administration seminars
- ☐ **FREE** preliminary financial and estate plan coordination
- ☐ **FREE** referrals to accountants

ATTORNEY QUALIFICATION

- ☐ Seek an attorney with a practice focused on estate planning, not a general practice that may occasionally plan for existing clients
- ☐ Contact the state bar and inquire about past complaints
- ☐ Ask about the nature of Continuing Legal Education the attorney has recently taken. Such education should be focused on topics relating to estate and tax planning, and elder law, not on unrelated topics
- ☐ How many CLE Hours does this attorney fulfill each year? *(Academy Members are required to complete **36 hours/year in estate planning and elder law**, most states require less than 15 hours and it may be in unrelated areas)*
- ☐ Your family will need this firm in the future—how long have they existed and how will their clients be served if your attorney leaves?
- ☐ Beware of "trust mills," often out of town visitors offering discounted plans with a back-end sale of another type (insurance, etc).

ZIMMER LAW FIRM
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Member of the American Academy of Estate Planning Attorneys




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Will Your Estate Plan Be Customized to Meet Your Needs?

CUSTOMIZED LEGAL DOCUMENTS AND SERVICES

- ☐ Must offer basic Will services
- ☐ Living Trust Services should include:
  - ☐ *Documents for funding of trust; unlimited processing support*
  - ☐ *Last Will (Pour Over)*
  - ☐ *Property Power of Attorney*
  - ☐ *Power of Attorney for Health Care*
  - ☐ *Property Agreement*
  - ☐ *Living Will*
  - ☐ *HIPAA Release*
  - ☐ *IRA Stretch Provisions*
    - ☐ *Allows your beneficiaries to stretch or defer income taxes on your IRA*
  - ☐ *Disability Provisions*
  - ☐ *Hold Back Provisions*
    - ☐ *Allows the Trustee to withhold distributions from beneficiaries who should not receive assets. (For example, due to financial inexperience)*
  - ☐ *Powers of Appointment*
    - ☐ *Allows beneficiaries flexibility in determining where assets go after their own death*
  - ☐ *Remarriage Protection in the event a surviving spouse remarries*

CUSTOMIZED LEGAL DOCUMENTS AND SERVICES

  - ☐ *Flexible Distribution Options for Beneficiaries*
    - ☐ *Creditor Protection*
    - ☐ *Divorce Protection*
    - ☐ *Generation-Skipping*
    - ☐ *Special Needs Trusts*
  - ☐ *Special Co-Trustee Provisions*
    - ☐ *Allows independent party to amend for change in law or circumstances*
    - ☐ *Allows independent party to mediate disputes*
  - ☐ *No Contest Clause*
    - ☐ *Discourages challenges to your estate plan*
- ☐ Funeral Trust ready for funding
- ☐ *My Legacy* Workbook to share family stories, life lessons and values with the next generation
- ☐ Must offer advanced planning, probate and trust administration services
- ☐ Easy-to-understand explanation for each document
- ☐ Transfer of out-of-state real property to your Trust
- ☐ Trust customized for client's needs and circumstances

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