

Estate Planning Procedure

I need a will or trust! Contact the Law Office of Steven Berger, LLC

Phone call from office to confirm contact information

Information form sent to client, first appointment scheduled

Complete form and return to office for review

First appointment: Meeting with Attorney to design plan

Plan developed based on each client's specific needs

Names summary and summary of will or trust sent to client for review

Fine tuning and corrections if needed

Signing appointment: Sign Will, Healthcare, Financial Power of Attorney

Documents notarized, filed in client book

Deed recorded with Land Records

Wills filed with Register of Wills for safekeeping

Thumbdrive for client prepared

Funding meeting for Trusts

Estate Plan is ready for Client to pick up!