6 Step Process – Living Trust Preparation

1. Initial Plan Meeting: _______
    a. Collect information
    b. Gather financial statements
    c. Discuss goals and desires
    d. Collect first payment

2. Inheritance Conversations _______
    a. Meeting with Dr. Green to discuss family dynamics and handle possible issues, upfront

3. Plan Design: _______
    a. Discuss needs and start document production
    b. Continue to gather outstanding statements/items/information

4. Draft Approval: _______
    a. Send client(s) drafts to approve
    b. Answer any final questions
    c. Make any final changes

5. Signing Party/Documents: _______
    a. Notarize documents
    b. Witness Last Will & Testament
    c. Collect final payment, Pay Notary fee

6. Funding the Plan: _______
    a. Handle any recording issues
    b. Prepare final Exhibits
    c. Collect final statements and transfer non real estate assets
    d. Prepare client for drafting Letter of Instructions to Successor Trustee
    e. Send recorded deed to client for insertion in Trust Binder
    f. Discuss Maintenance Program

