

Estate Planning Process

- Initial consultation with attorney
- Review, initial, sign and date Representation and Fee Agreement
- Complete, sign and date Estate Planning Questionnaire
- Mail or drop off at PSS Law the following:
  1. Signed Representation and Fee Agreement
  2. Check made payable to **Sylvester Law Firm Client Trust Account**
  3. Completed and signed Estate Planning Questionnaire
- Attorney to complete first drafts of estate planning documents and mail same to client(s) for review
- In-person meeting with attorney to review first drafts
- Attorney makes changes to first drafts (if applicable)
- Schedule meeting for signing of final drafts
- Signing meeting
- Store original documents in safe places