Finding a Trusted Guide

- 1. Is the attorney's primary focus on estate planning?
- 2. Does the attorney work with your other advisors?
- 3. Does the attorney charge a flat fee and state clearly what you are getting?
- 4. Does the attorney have staff members to help you if they are busy or on vacation?
- 5. Does the attorney have a process to keep your plan up to date?
- 6. Can you see yourself working closely with that attorney on the most important things in your life for the most important people in your life?



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