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PROTOCOL FOR NEW ESTATE PLANNING CLIENTS

Thank you for considering Legacy Law Group of Northern Virginia, to assist you with your estate planning matters. Our estate planning appointment protocol is a three-step process and is as follows:

Step 1: Questionnaire

Once you contact our office for an appointment, you will receive our confidential planning questionnaire either by U.S. mail or as an email attachment. Alternatively, you may download the questionnaire directly from this website via the link below. We ask that you try to return the completed questionnaire to our office by mail at 8567 - D Sudley Road, Manassas, Virginia 20110, or via email at dwilks@lgnova.com, at least two (2) days prior to your scheduled appointment. As you will find, our questionnaire includes all of the family and financial information we would like to know about you to properly advise you on your estate planning options.

Click on the link on our website Forms section to download the Confidential Questionnaire for Married Couples.

Click on the link on our website Forms section to download our Confidential Questionnaire for Single Persons.

While it would be helpful, there is no need to undertake a “treasure hunt” to obtain all your financial assets, bank accounts, stock certificates and insurance policies in completing our firm’s questionnaire. Often we find that clients will procrastinate in getting their estate planning done because they cannot locate, or feel they may not have the time to locate, all of their financial documents. Realistically, these financial documents may not even be necessary until after you have completed and executed your estate planning documents. Therefore, we encourage our clients to continue with the planning momentum they have in having contacted our firm in the first place and not stressing about having to put their hands on all of their financial accounts and assets before moving forward with the planning process.

Step 2: Initial Appointment

During our initial appointment, we will use the completed questionnaire as a springboard into getting to know you and your family. Based on the information you will have provided to us through your completion of our questionnaire, and our discussions during this initial meeting, we strive to provide you with our opinion regarding: (1) whether our firm may be able to assist you; (2) the estate planning options that we believe you should consider to meet the goals you will have communicated to us; and (3) the fees associated with the various estate planning options that we will recommend. Please note we charge a consultation fee for this initial meeting that our staff will review with you at the time you make your appointment and that we will collect at the time of the meeting. However, should you decide to engage our firm to prepare documents for you based on our discussions in this initial meeting, we gladly will apply the consultation fee to the overall cost of our estate

planning services, thereby rendering the initial meeting free to you should you decide to engage our firm for your estate planning services.

Step 3: Engagement Agreement

Following up our initial meeting, we will provide you with a written engagement letter and agreement detailing the specific documents we recommend to you and the legal fees and costs associated with the preparation and execution of those documents. We strive to bill on a flat fee basis as much as possible for our legal services in the estate planning arena; however, the nature of the fee and whether it will be billed on a flat fee or hourly basis will depend upon the complexity of your individual family and financial circumstances. If we are able to bill on a flat fee basis, as we strive to do whenever possible, the amount of the fee will not change regardless of the amount of time and number of meetings we may have with you (either in person or by phone or email) to complete the execution of the documents comprising your estate plan. Whether billed on an hourly or flat fee basis, our engagement letter and agreement will describe the documents and the billing arrangement that will apply to the engagement. Should you then decide to proceed, there will be an engagement agreement that you will need to sign and return to our Manassas, Virginia office, together with the payment of a deposit to bind the engagement, which if a flat fee engagement will be one half of the fee, or if an hourly engagement will be the dollar amount provided in the engagement letter. The balance of the fee, less the consultation charge that you will have paid, will be due upon the execution of your estate planning documents.

Once we receive the signed engagement agreement and the payment of the deposit from you, we then will prepare initial drafts of your estate planning documents based on the information you will have provided to us in your completed questionnaire as well as any supplemental information we may have discussed about your specific circumstance in our initial meeting. We then will forward these initial drafts to you for your review by either U.S. mail or via email. We intentionally send these drafts to you first before reviewing them together with you for two reasons: (1) first, we do not want any of our clients to sign any documents that they have not read first; and (2) second, we do not want any of our clients to sign any documents that they do not understand. By sending the initial drafts to you to review on your own first helps to ensure that we have met these two important goals for you. Accordingly, once you have had the chance to review the documents on your own, we ask that you contact us to arrange a day and time for us to review the documents together with you to answer all questions you may have, to explain provisions that you may not understand, and to make appropriate changes. We then will repeat this draft and review process as many times as is necessary for you to feel comfortable signing your documents, ensuring not only that you understand what you are signing but also that the documents properly reflect your instructions. Typically from beginning to end, the entire process will take about three (3) to five (5) weeks to complete.