

# OKGC

O'HALLORAN KOSOFF  
GEITNER & COOK, LLC

ATTORNEYS AT LAW

## ESTATE PLAN REVIEW – OKGC ESTATE PLANNING CLIENT

### When to Review

- ♦ We recommend that you review your estate plan if, since the most recent review, circumstances have changed concerning your family, finances or estate planning objectives; if you have some nagging questions regarding your plan; or if it has been five years or more since your last review.

### Our Estate Planning Attorneys

- ♦ OKGC has been in business since 1979 – over 40 years. Of our 20+ attorneys, two of them (Neal Geitner and Ben Steiner) have more than 60 years of collective experience devoted primarily to estate planning and estate settlement.

### What to Expect

- ♦ During an estate plan review (60 – 90 minutes), we will update the information we have concerning your family and finances.
- ♦ We will walk you through your existing estate plan documents – explaining how they work (personally and in terms of taxes), asking whether there are any changes you are thinking about and suggesting any other changes that you should consider.
- ♦ Finally, we will recap the meeting and confirm any work to be done as a result of the review.

### What to Bring

- ♦ If you are married, bring your spouse (unless the two of you have separate estate plans and attorneys). We have found that meeting with one-half of a married couple is not productive.
- ♦ Ideally, a completed Estate Plan Data form (provided by us or obtained via our website). However, you needn't cancel or postpone a scheduled meeting just because you *haven't done your homework*. If you come as you are, we'll fill it out (to the extent possible) during our meeting.

### What It Costs

- ♦ We charge \$335 for an estate plan review if you bring a completed data form and \$450 if we complete it during our meeting. Any work that we do at your direction after the meeting will be charged at our hourly rates in effect at the time. When practical, we will estimate the time and expense to complete any such work.

### How to Get Started

- ♦ To schedule an estate plan review, call or email Jodi Mrowiec ([jmrowiec@okgc.com](mailto:jmrowiec@okgc.com)) Monday – Wednesday or Leslie Rodgers ([lrodgers@okgc.com](mailto:lrodgers@okgc.com)) Thursday – Friday.

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