

OKGC

O'HALLORAN KOSOFF
GEITNER & COOK, LLC

ATTORNEYS AT LAW

ESTATE PLANNING – INITIAL MEETING

What to Expect

- ♦ Your initial estate planning meeting with one of our attorneys will be completely confidential and without any obligation to retain our services afterwards. We will ask questions and gather basic information regarding your family and finances.
- ♦ If you have any existing estate plan documents (see below), we will walk through them with you – 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.
- ♦ If you don't have any existing estate plan documents (or if a review of your existing documents finds them unsalvageable), we will ask enough questions to develop an outline of a new estate plan.
- ♦ Finally, we will recap the meeting and, in most cases, present a written proposal (including our fees) for any estate planning steps that we recommend. There will be absolutely no pressure.

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 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.
- ♦ Bring a copy of each of the following documents, if any, which you have and which have not been cancelled or revoked: will, codicil, trust, trust amendment or restatement, power of attorney, living will, prenuptial agreement, postnuptial agreement, divorce decree or marital settlement agreement, and any document in the nature of a “buy-sell” or “shareholders” agreement.
- ♦ Ideally, bring a completed Estate Plan Data form (provided by us or obtained via our website). However, don't cancel or postpone a scheduled initial 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 the meeting.

What it Costs

- ♦ We charge a flat \$335 for an initial estate planning meeting, which generally lasts 1.5 – 2 hours. Although we are retained about 90% of the time after an initial meeting, those who haven't retained us have almost uniformly told us that they found the time informative, eye-opening and well worth the time and expense.

How to Get Started

- ♦ To schedule an initial estate planning meeting, call or email Jodi Mrowiec (jmrowiec@okgc.com) Monday – Wednesday or Leslie Rodgers (lrodgers@okgc.com) Thursday – Friday.

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