META*law, inc.*
MUEGENBURG ESTATE & TRUST ATTORNEYS
Because every life needs a good plan.

LEGACY DISCOVERY PROCESS
MEETINGS OUTLINE

Initial Consultation ***w/Attorney***	• You will meet with our attorney to discuss your Estate Planning goals and concerns • Our attorney will make a recommendation for the Foundational Trust Design that will best meet your needs • We will provide you with an ***Engagement Agreement and Description of Fees*** which will include a fee quote for our services
Project Meeting ***w/Paralegal***	• We will review the features of the selected Foundational Trust Design • We will present the ***Project Workbook*** including the ***Personal and Financial Information Worksheets***, ***Asset Document Checklist***, and ***Personal Choices Worksheets*** • We will explain the ***Project Schedule*** • We will review the assignments for, and schedule, the ***Choices Meeting***
Choices Meeting ***w/Paralegal***	• We will review your completed ***Personal and Financial Information Worksheets*** and ***Personal Choices Worksheets*** • We will schedule a ***Follow-up Phone Meeting***, if necessary, and the ***Drafts Meeting***
Drafts Meeting ***w/Paralegal***	• We will present and review your ***Draft Estate Planning Documents*** • We will review the ***Asset Document Checklist*** items • We will schedule a ***Follow-up Phone Meeting***, if necessary, and schedule the ***Signing Meeting***
Signing Meeting ***w/Paralegal***	• We will present your finalized ***Estate Planning Documents***, reviewing any changes made to the drafts • You will sign, and we will witness and notarize, your ***Estate Planning Documents*** • We will review the asset transfer process and give you instructions for completing the transfers • You will leave our office with your completed ***Estate Planning Documents***