

Good Morning,

Congratulations on choosing to take the initiative to secure the decision that you want to make for your Estate for whatever the future holds.

The process may seem complicated on the onset, but the system that we created at Estate Plan Documents was designed so that you can appreciate setting up your family’s Legacy for the rest of time.

Your first appointment (1 of 2) is scheduled for Tuesday, May 4th at 5pm. During this 45-60 minute focused meeting, we will dive deep into the fact-finding process for your Estate Plan.

Attached are **five** documents that will help you get prepared and ready for our meeting. Please complete as much as you can of the Family Data and Asset/Liability pages so that we can properly assign beneficiaries as needed in your Trust. The People & Organization attachment is used to list 3 Successor Trustees, 2 Healthcare and 2 Financial Power of Attorneys.