



Our **7** Step Legacy Builder Process

At Woods & Bates, P.C., we believe that estate planning is more than just drafting a Will. Estate Planning is a vitally important process that ensures your assets are distributed according to your wishes, your loved ones are cared for, and your financial legacy is preserved. Whether you're just starting out or revisiting an existing plan, understanding the steps in our process can provide clarity and peace of mind. Our 7 Step Legacy Builder Process will help you secure your future and that of your beneficiaries.

STEP **1** Create Your Secure Online Portal Account

Once you have made the decision that it is time to secure your legacy and contacted our office by telephone at (217) 735-1234 or online [here](#), we will gather some initial information from you. Once we ensure we are able to assist you, we will send you an invitation to create an account on our secure online portal, which will look like the following:

Confidential Client Questionnaire
Please create an account to secure your information.

[Sign in instead](#) [Create Account >](#)

Once you have created your secure account online, the portal will guide you through the informational questionnaire and provide us with the information necessary to make our time together as productive as possible. All information exchanged between the browser and the server is encrypted while being transmitted and encrypted while saved.

STEP 2 Schedule Legacy Assessment Meeting

Once you submit your questionnaire through the secure online portal, we will contact you to schedule a legacy assessment meeting with one of our attorneys. (Our reasonable flat rate price for this meeting will be collected at the time the appointment is made.) This meeting can be accomplished either in person at one of our office locations, by phone, or by Zoom, depending on your preferences.

STEP 3 Legacy Assessment Meeting with Attorney

During this meeting, we will:

- ✓ Review of any estate planning objectives you hope to accomplish (avoid probate, make inheritance for children divorce-proof; address any unique family circumstances)
- ✓ Answer questions regarding who you wish to leave your assets to (spouse, children, or others), how they will inherit (outright or in trust), and who will be in charge of your estate (power of attorney, executor, successor trustee) when you die or become incapacitated.
- ✓ Discuss the most tax-efficient way to accomplish your estate planning objectives.
- ✓ Provide you with a summary of the simplest ways to accomplish your desired objectives.
- ✓ If you wish to move forward with the plan Woods & Bates, P.C. suggests, we will provide you with our reasonable fixed rate price agreement for the legal services for your signature. We will also collect your payment for those services at this time.

STEP 4 Review of Draft Documents

Shortly after you have engaged Woods & Bates, P.C. for your estate planning work, we will transmit drafts of the documents that you have discussed with the attorney in your legacy assessment meeting for your review.

STEP 5 Questions and Revisions

Once you have had a chance to review your draft documents, please contact us to discuss any questions you have about the documents or anything you see that you believe may need to be revised. This step can be accomplished in person, by telephone, or by Zoom depending on your preferences.

STEP 6 Make It Official

After all your questions or concerns have been satisfied, and you are comfortable with the plan we have created, we will schedule a time for you to sign your original documents. Once we have scheduled your signing appointment, your documents will be formally prepared and in their final form for your appointment. We will arrange a sufficient number of our staff members to guide you through the signing of those documents, and they will witness and notarize the documents as necessary.

STEP 7 Ongoing Review

We routinely advise clients to review their estate plans when life circumstances change, such as death, marriage, divorce, birth, etc. However, we find that this does not happen consistently. We also find that, when someone passes away, their asset ownership and beneficiary designations are not all aligned with the intent of their original plan. For that reason, we have crafted a Client C.A.R.E. program that we hope will solve these common problems. Further information about the Client C.A.R.E. Program can be found [here](#).

It is our hope that by offering an ongoing Client C.A.R.E. Program to our clients that our firm will be able to help you, the client, fulfill the ultimate goal you set out to accomplish when you made the plan in the first place – to take care of your family and loved ones.

Don't hesitate. Contact us now to get started on the path to securing your assets and ensuring your loved ones are provided for. Call Woods & Bates, P.C. at (217) 735-1234 to speak with a lawyer in Illinois or [**contact us**](#) online to schedule a consultation. Let us guide you through the creation of your estate plan, providing the peace of mind you and your loved ones deserve.