



CLIENT NAME: \_\_\_\_\_

INITIAL MEETING DATE: \_\_\_\_\_

# OUR VIRTUAL PROVEN PROCESS

## OUR PROMISE TO YOU

A Lifetime of education and support for YOU and your FAMILY

VIRTUAL INITIAL CONSULTATION →	VIRTUAL DESIGN MEETING →	VIRTUAL PROF. PARTNERSHIP MEETING →	VIRTUAL SIGNING MEETING →	VIRTUAL TRUST FUNDING MEETING →	ANNUAL REVIEW →
_____ DATE _____ TIME	_____ DATE _____ TIME	_____ DATE _____ TIME	_____ DATE _____ TIME	_____ DATE _____ TIME	_____ DATE _____ TIME
<ol style="list-style-type: none"> <li>1. Discuss your family goals and concerns in more detail</li> <li>2. Get your questions answered</li> <li>3. Determine which type of plan best meets your needs</li> <li>4. Make a decision and sign fee agreement</li> </ol>	<ol style="list-style-type: none"> <li>1. Design plan with attorney</li> <li>2. Provide and review requested documentation</li> <li>3. Finalize decisions on structure, appointments, and beneficiaries</li> </ol>	<ol style="list-style-type: none"> <li>1. Discuss estate planning/asset protection strategy with advisors</li> <li>2. Make sure planning goals align with financial goals</li> <li>3. Discuss funding strategy</li> </ol>	<ol style="list-style-type: none"> <li>1. Answer questions</li> <li>2. Make changes if necessary</li> <li>3. Review and execute estate plan</li> </ol>	<ol style="list-style-type: none"> <li>1. Review &amp; discuss all accounts and assets being funded into your trust</li> <li>2. Review &amp; submit signed financial institution request forms</li> </ol>	<p><b>For continued peace of mind...</b></p> <p>Review plan and discuss significant life events</p> <p>Discuss changes in the law</p> <p>Make changes to documents if necessary</p> <p>Retitle new/changed assets</p>



**RUTKOWSKI**

LAW FIRM

ASSET PROTECTION & ESTATE PLANNING

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PROVIDING PEACE OF MIND THROUGH THOUGHTFUL PLANNING