



How We Work With Our Clients

Probate: We make the probate of an estate easy for our clients. After 30 years of probating estates, we understand that our clients are upset over the loss of a loved one and that many times, they do not have all of the financial information needed at the first meeting. We help our clients get organized and work closely with them to gather all of the information needed to probate an estate. We will do all of the work required to administer an estate in a timely and efficient manner. We prepare all court required paperwork and estate tax returns. We guide the Executor throughout the probate process. We keep costs down by using trained paralegals who are supervised by our attorneys. We provide the details of our services and who performs those services for you. If you need our probate services, please call or email us.

Estate Planning: We begin the process of estate planning with an Estate Planning Questionnaire which we forward to you for your completion. The Questionnaire can be sent back to us in advance or brought to your first meeting. Initial meetings are usually at no charge for general estate planning work. After our meeting, we will provide a recommendation for documents and we provide a specific fee quote so that our clients know exactly what any work will cost. Some of the documents and services we provide include:

- Advance Directives for Health
- Living Wills
- Financial Powers of Attorney
- Wills
- Revocable Trusts for individuals and married couples
- Bloodline Trusts
- Special Needs Trusts
- Gifting Trusts
- Charitable Gift Planning
- Charitable Remainder Trusts
- Formation of Foundations and Non Profit Organizations
- Family Partnerships
- Limited Liability Companies
- Grats
- Shareholders Agreements
- Asset Protection Advice
- Tax Planning
- Probate and Trust Administration
- Guardianship