



UNDERSTANDING THE ESTATE PLANNING PROCESS



The Law Office of Keith R. Miles, LLC

THE PLANNING PROCESS

Peace of Mind is Here in Georgia and North Carolina

We know that beginning your estate plan is a big step. Our process is designed to ensure your confidence in the planning process, each step of the way, and our planning process is the perfect combination of efficiency and consideration.

Every decision is carefully reviewed with you and the entire process usually lasts under six weeks. You can feel confident knowing that your family wealth plan can be put into action, protecting your assets from being at risk of getting stuck in court or conflict if something happens to you.

Your Initial Consultation: The Family Wealth Planning Session

The cost of long-term care often shocks retirees and can place an extreme burden on themselves or their families. Long-term care expenses are uncertain and can fluctuate from very little to over \$1 million. Attempting to plan for this yourself without a professional's help is risky, and even the most carefully thought out retirement plans would not be able to handle this spending shock.



If We Both Agree to Proceed ...

Assuming we both agree to proceed forward, we will quote you a price, typically a flat fee from our price schedule. You will sign the engagement agreement and then we will work together to design the right plan for you and your family. After designing your plan through drafting and follow-up meetings to your satisfaction, you will receive a binder of your newly prepared estate plan documents. We will discuss arrangements for you to get the documents signed. Once the documents are signed, your family and your assets will be protected in case of your incapacity or death.





In Most Estate Planning Law Firms, The Relationship Ends There

We see the signing of your estate plan documents as the beginning of our relationship with your family. This is where our law firm is very different. After you sign your estate plan, we don't simply send you on your way. Instead, we create an elec-

tronic record of all your legal documents so you can easily access them anytime. We keep access open to our client portal for you.

Then, We Still Aren't Finished!

Through our client portal, even when your documents are delivered and the engagement is officially over, we keep in contact with you. We can meet with you if you have major life changes. We also encourage you to meet with us at least every three years to review your plan and make sure it stays up to date. We do this to increase the likelihood of your documents working when your family needs them.

AN ESTATE PLAN DESIGNED JUST FOR YOU

Estate planning at The Law Office of Keith R. Miles, LLC is not "one size fits all."

We offer custom estate plans to suit your specific needs. From starter plans designed primarily for families with young children and not yet much in the way of financial wealth, to more robust plans for well-established families concerned with matters of asset protection, preservation, and increased growth, we have you covered.

Personalized Service and Fees

We have priced our planning for you at the intersection of affordability and effectiveness. We typically offer flat fees for estate planning and hourly fees for probate and estate administration matters. You are provided with a fee schedule prior to your consultation.



Helping You Throughout All Stages in Life

We represent all family types at various stages of life, including:

- Traditional two-parent families or single parents wishing to provide for, and protect, their children and themselves.
- Unmarried couples who are either solidifying their relationship through proper planning or dissolving their relationship with the assistance of caring counsel.
- Blended families negotiating the challenges of creating new relationships with varying expectations and needs.
- Families with children with special needs who are looking to ensure that those children will be taken care of and able to continue to receive government assistance.
- High-net-worth families seeking strategies for minimizing estate and income taxes.
- Estate executors and beneficiaries navigating the court process of probate administration.
- Family members or trustees carrying out the legacy left behind through a trust administration.

We Help You Ensure Your Plan is Current

Your plan needs to evolve with you as your life changes and as the laws change. We try to keep all our clients updated about changes in the law and issues that might affect their lives. We often serve the whole family and multiple generations of the same family. From estate checkups for elderly parents to basic planning documents for young adult children, become part of our client family and feel how much we care.



HOW MUCH IS ESTATE PLANNING?

Why Cost Matters

This is a good question that we want to answer for you as clearly as we can, given that there is not a “one-size-fits-all solution” for every family

Estate planning is a customized process that should reflect your individual situation. The firm works with you to produce a set of documents that reflect your values and work when the individual or family needs them.

Here Is What We Can Assure You

We will design and price an estate plan for you and your family at the intersection of affordability and effectiveness.

When we meet in person, we will review everything you own and discuss everyone you love. You will understand exactly what would happen in the event of your incapacity or death.

Plus, we will help ensure that no matter what happens, none of your hard-earned assets will be lost when something happens to you. Here is the most important part for you to know about this: you will be making informed, educated, empowered decisions for the people you love.

If after reading this you are ready to make informed, empowered, educated decisions for the people you love, schedule an appointment with The Law Office of Keith R. Miles, LLC today.



THE LAW OFFICE OF KEITH R. MILES, LLC

ATLANTA MIDTOWN
1201 West Peachtree Street
Suite 2300
Atlanta, GA 30309

GWINNETT
3675 Crestwood Parkway
Suite 400
Duluth, GA 30096

P: 770-817-7636

F: 770-818-5745

Info@EstatePlanEsq.com

www.EstatePlanEsq.com