LUMINA LAW

Estate Planning Process for Your Clients

Step 1: The Referral

Advisor sends email introducing client to Lumina

Client books a 60 minute discovery session on Zoom using Lumina’s calendly.
https://calendly.com/luminalaw/60-minute-estate-planning-discovery-session?month=2023-11
(In-person meetings can also be arranged)

Lumina will ask the advisor for some basic information on the client

Step 2: Client Discovery Zoom Session (1 hour)

Client receives:
1. Preliminary advice and completion timeline;
2. An engagement letter to e-sign, including a fixed fee quote

Client signs Engagement Letter and books Signing Meeting Date in Vancouver, North Vancouver, Richmond, Burnaby, Langley, Nanaimo, Victoria, or Kelowna
https://calendly.com/luminalaw

Client receives drafts and sends questions by email or books a call to review documents

Step 3: In-Person Signing Meeting (30 Minutes)

Signing meeting ideally has all executors, trustees, attorney, and health care representatives present

Clients will receive a reporting package:
1. Wills will be registered with government
2. Certified copies of all clients
3. Reporting letter with invoice for services.

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