

Jeyaram & Associates | Estate Planning Process



Meet with Attorney DJ Jeyaram via Zoom. You don't need to prepare anything before the meeting. Just bring your questions! At the end of the consult, he will recommend different flat-fee plans based on your family's needs, wants and situation.



If you decide to move forward with our law firm within 30 days of your consult, we apply the \$200 consult fee to your Estate Plan. Send an email to DJ (DJ@JeyLaw.com) that you'd like to move forward.



We'll send you an engagement letter via email to sign. Once you return the engagement letter, we will charge your credit card ½ of the amount of your Estate Plan.



You'll receive a link(s) to an online questionnaire. We use that information to draft your Estate Plan. And don't worry if you don't know all the answers - you can always send us an email or call with any you questions have. You'll also have a chance to ask questions during your Review Call.



Once you complete the online questionnaire, you'll schedule a Review Call with one of our attorneys to go over your information. Prior to your Review Call, we will charge your credit card the second and final payment of your Estate Plan.



During your Review Call, you'll meet with one of our attorneys to go over your information to make sure the best legal protections are in place for your family. This meeting is also designed to make sure you understand what's in your plan! At the end of the meeting, you'll schedule a time to sign your documents. You're almost done!



Signing day! You'll sign your documents with one of our attorneys. The signing usually takes about 30 to 45 minutes.



You'll receive your finalized and signed Estate Plan and Child Protection Cards in the email. Please make sure your family members know where to find this important information.

Estate Plans should be updated every 3 to 5 years or sooner if you experience a major life change such as a divorce, birth or adoption of a child, death of a family member listed in the Estate Plan, or significant change in finances. © 2025

