

# Estate Planning

## In Six Steps

 MH LAW

1.

### Initial Consultation

Discuss your estate planning objectives and arrange a custom-tailored solution matched to your unique circumstances. Explore flat-fee based service options



2.

### Estate Planning Worksheets

Complete user-friendly worksheets carefully designed to help you understand issues related to estate planning, ensuring informed decision making when it comes to your estate plan.



3.

### In-Person Meeting

A meeting to review your completed worksheets, answer questions and confirm your instructions takes place at your convenience. Explore probate planning strategies, tax avoidance mechanisms and other strategies based on your unique needs



4.

### Document Drafting

Your instructions are reduced to writing by Mr. Holowatsch who prepares draft copies of your testamentary documents for your review and approval. Clients review draft documents in advance and at their own pace



5.

### Review and Execution

Final documents are prepared and presented to clients at a final in-person meeting. Clients review and execute documents properly in the presence of a witness, who swears an affidavit of execution; meeting the standards of due execution



6.

### Safekeeping

All original documents are kept in a fireproof safe - safeguarded diligently pursuant to professional standards. Original documents are released only where certain conditions are met. Notarial copies of documents are provided forever free of charge



 MH LAW

 WWW