

QUESTIONS TO ASK ESTATE PLANNING ATTORNEY

1. *How many years have you been practicing estate planning law?*

Acceptable answer: At least 7 years.

Preferred answer: At least 10 years.

2. *What percentage of your practice is devoted to estate planning law?*

Acceptable answer: At least 50%

Preferred answer: At least 75%

3. *How many trusts do you draft on average per year?*

Acceptable answer: At least 50

Preferred answer: At least 100

4. *How many trusts have you drafted?*

Acceptable answer: At least 500

Preferred answer: At least 750

5. *If I own property or spend time in other states will you draft documents for me which cover those other states (such as Powers of Attorney) so that I do not have to hire an attorney in each state and will you record deeds to my property in those states placing that property in my trust?*

Preferred answer: Yes

6. *If I have a child with special needs, do you have experience drafting special needs trusts?*

The only acceptable answer: Yes

7. *If my estate planning needs are complex and/or involve in depth estate tax knowledge, can you answer all of my questions?*

The only acceptable answer: Yes

8. *Have you ever published articles on estate planning?*

Preferred answer: Yes

9. *How long will my initial consultation be?*

Acceptable answer: At least 45 minutes

Preferred answer: At least 1 hour.

10. *Will you make me fill out a long questionnaire before I meet with you or will you gather my information in person?*

Preferred answer: I will gather your information in person.

11. *Will you charge me for the initial consultation and to point out my options?*

The only acceptable answer: No

12. *Will you tell me at the initial consultation how much my estate plan will cost?*

The only acceptable answer: Yes

13. *When I come to sign my estate plan will you personally (not a Paralegal or secretary) explain each and every document to me in plain English before I sign?*

The only acceptable answer: Yes

14. *Will you bill me by the hour or give me one flat fee price that includes everything including follow up help and questions?*

The only acceptable answer: One flat fee price

15. *Will you notify me as laws change which may affect my estate plan?*

The only acceptable answer: Yes