

Estate Planning Process

- Initial consultation with attorney
- Review, initial, sign and date Representation and Fee Agreement
- Complete, sign and date Estate Planning Questionnaire
- Mail, email, or drop off at PSS Law the following:
 1. Signed Representation and Fee Agreement
 2. Check made payable to **Sylvester Law Firm Client Trust Account** or via Zelle to **SYLVESTER LAW FIRM, PC; (224) 330-0440**
 3. Completed and signed Estate Planning Questionnaire
- Attorney to complete first drafts of estate planning documents and mail or email same to client(s) for review
- In-person or Zoom meeting with attorney to review first drafts
- Attorney makes changes to first drafts (if applicable)
- Schedule meeting for signing of final drafts
- Signing meeting
- Store original documents in safe places