

# FAST TRACK Estate Planning Services



Elder Law + Life Care Planning + Medicaid Planning + Veterans Benefits + Wills & Trusts + Probate + Guardianship

**Estate planning is more important today than ever before.** That's why our Elder Law practice created FAST TRACK estate planning services. We now provide custom, high quality, comprehensive will-based estate planning documents with no in-person interaction. From retention to final document signing, our goal is not to exceed 10 business days. We'll provide you with great service and the peace of mind knowing that you and your family are protected in the event of a sudden downturn in health in these difficult times.



**Create a Last Will and Testament**  
to ensure your assets are distributed to the individuals of your choice and according to your terms



**Appoint an individual** to manage your legal and financial affairs, and to make healthcare decisions for you should you become ill



**Make your end-of-life wishes known** with a living will, reviewed with a trained attorney

After a review of your finances, family and goals, we will draft an estate plan that addresses death, incapacity, and protection of your assets from the high cost of nursing home care.



**Health Insurance Portability and Accountability Act (HIPAA) Release** for releasing your medical information to those you designate.

**Our FAST TRACK Estate Plan includes documents for a single person or couple, including:**



**Last Will and Testament**



**Durable Power of Attorney** for legal and financial decisions.



**Designation of Health Care Surrogate** for medical decisions.



**Living Will** for end-of-life wishes, saving your family or friends from having to make these tough decisions alone.



**Scanned copies of your documents,** a binder for storing your documents, and a guide for your heirs and family members to help them in a difficult time.

Your plan includes attorney guidance/ advice, drafting, and support to develop and implement your custom estate plan.



# Nothing is simple or straightforward in estate planning!

Don't leave your estate planning to chance. When you use online resources, you don't know the problems you are leaving for your family, friends and heirs. We do! We will help solve problems you didn't even know you had. Estate planning is one of the most important things you can do in your lifetime. Do it right and you'll enjoy the peace of mind you deserve!

## Our **FAST TRACK** Planning Process



**Schedule an Appointment.** Talk with one of our Intake Specialists who will assist you with scheduling your appointment with one of our qualified attorneys. We'll also send you forms to guide the consultation process.



**Consult our Attorney.** Discuss your goals and outline your wishes during a meeting with an attorney using video or teleconference technology. The consultation will include an hour to formulate a plan. If services are retained, your attorney will schedule a second meeting to review your documents with you, and a third meeting for signing of your documents.



**Review Your Drafts.** Review your documents and discuss your questions with an attorney using video or teleconference technology. The attorney will confirm your signing appointment and review the signing process with you.



**Sign in Safety.** Travel to our firm and an attorney will facilitate the signing of your documents in a socially-distant conference room, our designated outside signing table (weather permitting), or while you remain in the comfort of your vehicle (curbside signing).



**Receive Your Final Documents.** All original estate planning documents are delivered in a professional binder, as well as being scanned and sent by e-mail for your own reference and potential sharing with your family.

## Expedited Estate Planning Fees

### COMPREHENSIVE ESTATE PLANNING

**\$1,000** *for a single person*

**\$1,400** *for a couple*

### LAST WILL AND TESTAMENT ONLY

**\$500** *for a single person*

**\$700** *for a couple*

In our initial conference, we will counsel you on your best options and provide a quote for any fees for additional services you may request. Importantly, we are not here to upsell you on anything—we just want to give you peace of mind knowing that you and your family will be protected in these difficult times.

## Trust-Based Estate Plans

We have extensive experience with more complex, "trust-based" estate plans. In your consultation, we may discuss probate and whether such a plan is appropriate. Trust-based estate plans are ideal for those who: 1) want to avoid probate, 2) own land outside of Florida, 3) want to provide protective trusts for heirs, or 4) own multiple real estate properties.

Please call **727-397-5571** and ask for our **FAST TRACK** Estate Planning Services. We're here to help!