THOMAS SCIACCA | PLLC

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HOW TO PREPARE FOR YOUR ESTATE PLANNING CONSULTATION

Thank you for considering Law Offices of Thomas Sciacca, PLLC for your estate planning needs! We are pleased to offer a complimentary consultation to all New Yorker residents who are potential new estate planning clients. This consultation is the opportunity for us to get to know each other better, discuss the scope of any potential legal work that is needed, and see if we would like to work together on these important matters. This document can help you prepare for your consultation.

First, we encourage people to come into the consultation with an agenda. This time is all about you – what do you want to take away from it? Are you just getting started and want to learn a bit more about Wills, Trusts, Power of Attorney, Health Cary Proxy, Living Will, etc.? Are you shopping around among different attorneys to provide this service, or do you already know that you want Tom Sciacca to represent you? If you know you would like Tom as your Trusts & Estates Attorney, would you like a more substantive meeting to provide the information Tom will need to prepare drafts of your documents? All of these are acceptable goals for your time with Tom. Tom is not a high-pressure salesperson – if you are just gathering information or shopping around, you can do so without worry.

Another helpful tip – don't be shy about asking about cost. Paying for legal services is like anything else you may buy – you should ask about cost before committing yourself. At our firm, we provide all estate planning services on a flat-fee basis, which includes everything related to the documents between the time that you retain our services and the time you sign your documents. While Tom can absolutely quote you a flat fee during the consultation, our team can always answer questions about cost in advance – feel free to call or e-mail ahead of your consultation. Of course, if you get an advance quote for our team and then request further or more elaborate documents during the consultation, Tom will need to give you an updated quote.

What will be discuss during the consultation? LOTS! Tom will ask why you are interested in preparing/updating your documents, and what goals you have (providing for family, children, close friends, charities, ensuring that loved ones with special needs are provided for, etc.). He will also discuss the defaults that exist in the law and whether you need a Will at all (if your Will accomplishes exactly what would happen under New York's intestacy laws, you may not need a Will).

Tom will also discuss the benefits of Wills vs. Trusts, and the importance of having advance directives such as Power of Attorney, Health Care Proxy, and Living Will to allow others to make decisions on your behalf, should the need arise. Tom will talk about estate taxes and whether they apply to you. Tom can also review your existing documents that you prepared with another attorney and offer an opinion as to whether they need to be updated at all. Most importantly, Tom will answer your questions so that you can make the best decision for yourself.

At some point (either during the consultation or after considering it), you may decide that you want Tom to prepare your estate planning documents. Tom will need to interview you to gather that information. If you make your decision during the consultation, Tom will interview you to gather the information he will need to prepare your documents; if you decide afterwards, Tom will have a second appointment with you to gather this information.

What will Tom ask about? Some background information about you and your immediate next-of-kin, some information about your assets (types of assets and general estimates of their values), whether any of your assets already name beneficiaries (such as life insurance and retirement accounts, and who those beneficiaries are), your instructions concerning your bodily remains (burial, cremation, green funerals, services, celebrations of life, etc.), your desired beneficiaries to include in your Will (and alternates, if any of them should die before you), your choice of Executor (and an alternate), and whom you wish to make financial/medical decisions on your behalf, and under what circumstances. Some clients come in with this thoroughly answered, others want to have a conversation so that they can consider and get back to Tom with their decisions. Tom's goal is to gather the information in whatever way is easiest for his client.

Client is an important word. A client is someone who has signed a Letter of Engagement to work with this firm and paid any down-payment (for estate planning clients, this is half of the flat fee). During the consultation, you are not a client of our firm. Tom will never ask you to sign a Letter of Engagement during the consultation, nor will he ask for a down-payment. This is a no-obligation consultation, you will not receive an invoice if you choose not to retain our firm. It is of the utmost importance to Tom that you make the decision that is best for you. If you decide that you would like to retain us, please reach out to us after your consultation and we will send you a Letter of Engagement.

We look forward to discussing these important matters with you, and we are flattered that you have chosen to discuss them with us.

See you soon!