# Our New Client Process

**1 Initial Consult**

*Discuss your estate planning goals, concerns, family, and a little bit about your assets.*

*__Before__ your initial consult, you should provide the attorney with your completed Personal Information Form.*

**2 Document Signing**

*Review and sign your estate planning documents with an attorney.*

**3 Funding Your Trust**

*Work with LCPC staff to align your assets to your Trust(s) via ownership changes and/or beneficiary designation.*

**4 Maintaining Your Plan**

*Enroll & participate in our optional maintenance program to receive benefits such as, regular document updates, financial reviews, educational seminars, and reduced price fixed-fee settlement.*

LEGACY COUNSELLORS, P.C.

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