

About Our Initial Meeting

Your Initial Consultation

There is no charge for our initial meeting. We will use our time to get to know each other and to identify your estate plan objectives.

This will be a brainstorming and information session from which I will tell you about the solutions I see for your planning goals and their estimated cost.

You may have experience with lawyers (good or bad) or you may never have met one. Keep in mind that this meeting is mostly about you; that I am very interested to get to know you and to discuss what is on your mind.

You will want to know about me and discover a sense of whether you consider me to be the right lawyer in whom you can have confidence and with whom you can enjoy a good working relationship.

My office is informal to encourage clients to be comfortable while exploring these questions. My job is about trust, and I need to earn it.

What to bring.

I will ask for basic information about your family and your assets, and what planning you already have in place. This information is relevant to creating or amending an existing estate plan, as well as incapacity planning, most elder law issues, and related topics.

If you already have a Will, a Trust, Power of Attorney, a business agreement, and anything else you think will relate to our conversation, please bring them along.

If we are specifically working on changing or creating an estate plan, we will examine whether what you have or intend to create will best fit your financial and personal situation. Along the way, we will discuss those who you might choose to assist you (trustees, executors, agents, etc.), the persons we will name in your plan documents to act for you when you are no longer able to manage things on your own.

If you are creating a trust plan or changing trustees, it will help to review existing deeds to real property and any other title documents you may have.

Who is or will be serving as trustee is important because the trustee is the legal owner of the trust assets. That is how your trust is “funded”.

I should have more questions and suggestions by the end of our conversation.

What will we do?

It is my job to identify what legal services you need or that I recommend, and what the cost is likely to be. Also, I will let you know if there are predictable out of pocket costs involved, such as court filing fees, publication fees, the fee to the Probate Referee if we use on, software usage fees for tax returns, etc.

Then it will be your decision whether to hire me to do this work or not.

In most cases I will ask you to sign an agreement (“engagement”) with me setting out the terms of our lawyer-client relationship for the work we are to do. This is a requirement of the California State Bar that is intended to protect both of us and make our agreements informed ones.

I do not take retainers or any money up front. Generally, I will bill for my work and expenses when the project is completed. If what we do takes a significant amount of time, then I will bill periodically as we complete logical steps along the way.

Since you are reading this on the website, why not do some exploring and find out more about me along the way.

Please refer to my article “**One Lawyer, One Client**” for a review of my duties to you and the importance of determining “*Who is the client?*”