

Making Your Will - 12 Critical Steps

What You Need to Know Before You Hire the Wrong Lawyer to Make a Will

You've done your homework. Now you want to invest in a lawyer-prepared will. Is the price for legal services the final factor to consider?

Price is always a factor. However, the experience and service you want may be the deciding factors. You should know not every law firm offers the same standard of service.

You should find out what steps other lawyers will follow.

Here are 12 critical steps we take to make your will.

The 12 Critical Steps

- 1. You start by receiving an estate planning guide.** This information is on our website, can be mailed or e-mailed to you. The guide helps you to:

- focus your thoughts
- give us information needed to advise you, and
- understand our fees so there are no surprises.

You bring your completed questionnaire and necessary documents to your first meeting. This is critical for you to receive the best advice. It also saves time and money.

- 2. Your appointment is with a lawyer within a reasonable time.** A lawyer, and not a clerk, will review separation, marriage and shareholders' agreements. You will be advised if this requires additional time and fees.
- 3. You meet with a Certified Specialist in Estates and Trusts Law.** Lawyer and author, Edward Olkovich, will answer your questions and advise you. Your meeting will be private and confidential without anyone else present.

4. **You will receive legal advice to help you make key decisions, including choosing:**
 - executors or estate trustees
 - attorneys for property and personal care
 - beneficiaries and when trusts are necessary
 - guardians for your children
5. **You receive a review and analysis of your assets and liabilities.** This includes tax, probate and defensive estate planning strategies.
6. **You benefit from the experience of a lawyer who has practised estate law since 1978.** Edward Olkovich has written numerous books explaining the do's and don'ts of estate planning.
7. **Your instructions are confirmed before your will is prepared.** Your will must legally reflect your wishes and needs.
8. **You receive a complimentary estate planning book.**

Estate to the Heart

How to Plan Wills and Estates for Your Loved Ones

The world's fastest and easiest estate planning guide.

9. **Your draft will is sent within a reasonable time** for your review. You receive a written report on your estate planning and have time to consider changes.
10. **You meet with a lawyer to confirm** if changes are required. Once you are satisfied, all the formal signing requirements are then taken to make your will legal.
11. **You receive a complimentary will folder** to store your original will for safekeeping. We retain notes in your file.
12. **Your report includes a reminder when to update your will.**