Qualls Law Firm

PLAN YOUR JOURNEY

Getting Started: An Overview of the Process and FAQs

This brief document will provide you with all the information you'll need to determine if getting started with establishing or updating your Living Trust, Will and/or related estate planning documents with our firm is going to be a good match.

Our firm's model is primarily virtual, which is a terrific fit for many potential clients due to convenience and safety, but not for others who may favor more traditional in-person interaction and office visits. Please keep that in mind when determining whether to proceed, review the frequently asked questions below, and begin the appropriate interview if you wish to get started.

Here is a general overview of our process:

Step 1) Complete our online interview (*takes approximately 30-60 minutes, a link appears in the FAQ section below*)

Step 2) Schedule your attorney consultation via Zoom or over the phone (*approximately 1 hour*)

Step 3) We prepare your draft documents and submit them for review and discussion (*4-8 weeks from your consultation*)

Step 4) You sign your documents with our instructions and we record the necessary documents with the county on your behalf

Here are answers to the most common questions:

I'm ready to get started, what should I do?

First of all, congratulations on arriving at a place where you're making this a priority. We've made the process very convenient for you to get started online. Here's what you should do:

Complete our user-friendly online interview, which you can do securely from any device. It gives us all the basic information we'll need in order to advise you at your consultation, and guides you step-by-step through the key points of trust and estate planning, allowing you to accomplish a great deal before your initial consultation even takes place! Just fyi, the interview asks for general/approximate information and does not require any security-sensitive details. You can save and return to the interview as needed.

Here are the links for the individual (i.e. single) interview and the couple's interview:

Access the Individual Interview Here

Access the Couple's Interview Here

As soon as you submit the interview, you will automatically be prompted to Brian's online calendar to schedule your initial consultation via Zoom or by phone. Once you've completed your consultation, we should have everything needed to complete your Living Trust, Will, and related documents and will be able to provide you with an approximate completion date.

What are your fees?

Our fees are very reasonable for the level of expertise and support we provide, and are clearly laid out in this page of our website.

I have a legal plan through my employer, will it cover this?

In the majority of cases, the plan will cover a significant amount of the legal fees. The online interview will ask for your member information so that we can confirm specific coverage details with you towards the end of your consultation. Only then will we know exactly what level of service your situation requires in relation to the coverage provided by your plan. In general, most plans cover everything except for legal fees associated with planning for investment properties, businesses, trust funding services, tax planning, and third-party costs such as notary fees and county recording costs.

Will we have any in-person meetings?

At this time, we are not having any in-person office meetings because the risk of having clients come and visit a large office building isn't worth it and simply isn't necessary for most situations. We've found that video calls to consult and review documents are as effective as in-person meetings, and often even more so. As far as signing documents is concerned, we have convenient options for offsite signings and will receive your documents for processing before returning them back to you. That all being said, some clients really require the experience of an in-office meeting, which is 100% okay; however, it means that our firm would not be the right fit for that type of client.

Can I speak with you personally before proceeding?

Your personal estate planning consultation will occur after you have completed the online interview. That really is the most appropriate and effective time for a quality conversation. If however you truly feel that you need to briefly speak with Brian first, please book a call through this online calendar.

We hope the above information was helpful and look forward to connecting with you soon.

Warm regards,

Qualls Law Firm