Qualls Law Firm

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Getting Started: An Overview of the Process and FAQs

Thank you for considering our firm and congratulations on arriving at a place in your life where you are making this a priority.

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

Our firm's model is primarily virtual, meaning that your interactions with us will begin with a simple yet sophisticated online interview form followed by a personal attorney consultation over Zoom or via phone. This approach is convenient and highly desirable for many clients; however, it is not an ideal fit for others who prefer more traditional in-person office visits. Please keep that in mind when reviewing the information below, and begin the appropriate interview (for an individual or a couple) if you wish to proceed.

Here is a general overview of our process:

Step 1) Complete our online interview (*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 draft documents for your review and approval (*approximately 2-6 weeks from your consultation*)

Step 4) Sign your documents with the proper legal formalities either in your home, or at our office. From there, we'll record the necessary documents with the County on your behalf and deliver an organizer binder with your original documents as well as upload signed pdf copies to your secure client portal upon completion.

Below are answers to the most frequently asked questions (FAQs):

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

We've made the process very convenient for you to get started online. Here's what you should do:

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First, complete our user-friendly online interview below, 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 consultation even takes place! Please note that the interview asks for general/approximate information only and does not require any security-sensitive details. You can also save your progress 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

Next, as soon as you submit the interview you'll automatically be directed to Brian's online calendar to schedule your 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 as well as the associated fees and costs.

What are your fees?

Our pricing is fair and 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 insurance plan through my employer, will it cover this?

In the majority of cases, the legal plan will cover a significant portion 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, trust tax planning, and third-party costs such as notary fees and County recording fees.

Will we have any in-person meetings?

At this time, we're generally not having in-person meetings except for limited circumstances. We've refined our virtual/remote processes to be at least as effective as a traditional in-person experience, and often far more so. As far as physically signing

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documents is concerned, we have convenient signing options available at our office, or in your home or workplace with one of our trained mobile notaries.

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

Warm regards,

Brian E. Qualls

BRIAN E. QUALLS
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