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 related estate planning documents with our firm is likely 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 require more traditional in-person interaction and office visits. Please keep that in mind when reviewing the information below, and begin the appropriate interview if you wish to proceed.

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 draft documents for your review and approval (*3-6 weeks from your consultation*)

Step 4) Sign your documents with the proper legal formalities 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 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 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.

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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 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?

If you have a legal plan that you wish to use benefits for, please be advised that we currently only accept cases for couples (married or registered domestic partners) with MetLife insurance (also referred to as a Hyatt legal plan). We do *not* currently accept any insurance for individual planning matters (i.e. unmarried plan members or married members who are planning separately) or accept any other types insurance (for couples or otherwise).

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 costs.

Will we have any in-person meetings?

At this time, we are generally not having in-person meetings because the risk simply isn't justified or necessary for most situations. We've refined our virtual/remote processes to be at least as effective as a traditional in-office experience, and often far more so. As far as physically signing documents is concerned, we have convenient signing options with

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one of our trained mobile notaries who will return your documents to us for processing and county recording before we deliver them back to you.

In limited situations and for clients where having 100% in person attorney service is necessary and cost is not a factor, our website provides options for in person services through our Peak package.

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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