

Western Mass Estate Planning

Deirdre Gleason, Esq. Kate Downes, Esq.

Of Counsel

112A State Street
Shelburne Falls, Massachusetts 01370

(413) 625-2482 telephone
(413) 826-7700 facsimile
www.WesternMassEP.com

Kate@WesternMassEP.com
Deirdre@WesternMassEP.com

Elizabeth M. Smith, Legal Assistant
Emily B. Arsenault, Office Manager

Julie Johnson, Esq., Of Counsel
Pam Guyette, MassHealth Specialist

NEXT STEPS

1) If you want our office to prepare estate planning documents, you need to select which documents you want and return ALL of the following to our Shelburne Falls office:

a) Signed original **Fee Agreement** (keep the copy for your records).

b) **Deposit check** payable to *Western Mass Estate Planning*. The amount should correspond to the option you have selected and will equal 25% of the total legal fees. This figure does not include Registry of Deeds recording fees.

c) Fully-completed **Nominations Form**. This is the form where you select who will serve in various roles in your estate-planning documents. Please read the instructions at the beginning of each section to assist you with these important decisions. You may also call our office with any questions.

2) Within 1 week after receipt of all of these items, a member of the office staff will telephone you to ask follow-up/clarification questions and schedule the dates and times for a complete review of all of the documents (by Zoom or in person), and for the actual in-office signing of the completed documents (typically within 4-8 weeks).

3) Approximately 1-3 weeks prior to your signing appointment, you will receive by e-mail (or by USPS, if you do not have e-mail) a summary of the documents being prepared for you. It is imperative that you review this promptly and contact our office as soon as possible. This is your final opportunity to make changes to the order or spelling of names, or otherwise modify your decisions about the documents. Review the summary primarily for content (are correct names in the correct order?), rather than for concepts (which will be discussed during the review). We need to hear from you, in order to finalize and print the documents.

4) If you are signing trust documents, be on the lookout for two to three additional documents, which will arrive at some point between the summary and the signing date.

5) Prior to your appointment, we will deliver or mail you a full set of documents, which will be reviewed by the drafting attorney by Zoom, telephone, or in person.

6) Signings are currently in the office, with masks. We are also happy to sign on the front porch (with a space heater) or in your car. Please remember to bring a check for the balance of attorney and any Registry of Deeds fees. You will be given originals of all documents and our office will retain additional originals and/or copies.

Rest assured that, no matter how long any of these steps take, *you will never be forgotten!*