The Estate Planning Experience

I help ensure your estate plan doesn't just live in a binder but works in real life.

What You Need for an Effective Estate Plan

A legally sound structure, a coordinated financial plan, and ongoing guidance.

	Lucille (Private Wealth Advisor & Strategist)	Estate Attorney
Strategic Discovery	✓ Understand your family, business, and values	X
Asset Mapping	✓ Review all accounts, assets, titles, and policies	X
Legacy Design	✓ Help define your legacy wishes, priorities, and goals	X
Tax & Liquidity Planning	✓ Strategize around estate taxes, business succession, liquidity events	X
Trust/Entity Selection	✓ Collaborate on types of trusts or business entities needed	✓ Formalize structure in legal language
Draft Legal Documents	No	✓ Create the trust, will, POAs, and business documents
Asset Alignment	✓ Ensure accounts & properties are titled correctly	– (may advise)
Beneficiary Coordination	✓ Review and align IRAs, insurance, etc.	X
Ongoing Maintenance	✓ Update plan as life, laws, and goals change	– (unless retained)

Common Estate Planning Pitfalls I Help Prevent:

- ❌ Unfunded or misaligned trusts
- ❌ Outdated or contradictory beneficiary designations
- ❌ Lack of coordination between financial and legal sides
- ❌ Missed tax planning opportunities
- ❌ Incomplete business succession planning

Your Estate Planning Process:

1. 🧭 **Discovery Meeting** – Understand your financial life, family structure, and values
2. 🏗 **Design Phase** – Collaborate to design an estate & legacy plan that supports your complete picture
3. 📜 **Legal Drafting** – Partner attorney creates the legal documents based on the design
4. 🔐 **Coordination & Funding** – Ensure assets, titles, and beneficiaries match the plan
5. 📅 **Ongoing Guidance** – Regular reviews to adjust for life and law changes