



BARLAY LAW GROUP LLC

ESTATE PLANNING | REAL ESTATE | BUSINESS

GUIDING CLIENTS IN PROTECTING THEIR MOST IMPORTANT ASSETS: FAMILY, PROPERTY & BUSINESS

1805 OVERLAKE DRIVE, SE, SUITE A
CONYERS, GEORGIA 30013
MAIN: (770) 602-9924
FACSIMILE: (770) 602-9926

THUA G. BARLAY
CHARLEEN M. BARNWELL (*Of Counsel*)

WWW.BARLAYLAW.COM

THE BARWAY: OUR PROCESS

The planning process at the Barlay Law Group is a client-friendly approach, where we work to not only provide excellent legal planning, but take the time to make sure that you, the client, understand estate planning, your options and planning choices. We break down our process into five basic steps, meeting once, or multiple times for each step, to assure that you are comfortable with the decisions you will make. Those steps are as follows:

1. **New Client Workshop:**

The first step is ***to educate***. The workshop provides a brief introduction to estate planning. At each workshop, we spend some time discussing certain planning techniques and the advantages and disadvantages of each technique. We will also discuss the important roles that executors, trustees, and other fiduciaries play in the estate process. This workshop is absolutely free.

2. **Initial Consultation:**

The second step is ***to listen***. During this step, we will meet and discuss your goals and objectives. This is your opportunity to tell us your story. We will talk about you, your loved ones and any concerns you may have. Generally, only one meeting is necessary, but we will meet more often, if necessary. This initial consultation is also free. The only requirement is that you complete our intake worksheet at least 24 hours prior to the consultation. This will allow us to be able to direct the conversation.

3. **Design Meeting:**

The third step is ***to recommend and plan***. This step is to design the particulars of your plan based on the information gathered during the initial consultation. We may suggest a Will-based plan or a Trust-based plan, depending on the factors we previously discussed, including your goals, your family's needs and your assets. Our goal is to provide you with enough information to make an informed decision and to guide you on your options. We make no assumptions in this discussion, and thus we present you with choices you may not have known were available. Your plan is customized to meet your needs and answer your concerns.



BARLAY LAW GROUP LLC

ESTATE PLANNING | REAL ESTATE | BUSINESS

4. **Signing Meeting:**

The fourth step is *to execute*. This step involves a page-by-page review of the documents that will be a part of your plan. We will carefully examine all of the documents and provisions with you, describing their purpose and how the language we have created is tied to the issues we discussed during previous meetings. Once we are assured that they meet your needs, we will then sign each planning document.

5. **The Funding Meeting:**

For Trust-based plans only, the fifth step is *to fund*. Trust planning generally requires the transfer of assets into the trusts, while you continue to maintain control. In order to accomplish this important step in the process, we will meet with you to lay out a strategy. We may meet again, as often as necessary, at no additional charge, to assure that all of the necessary changes are made. Our aim is to make sure you are comfortable and understand your plan.

* **Annual Maintenance Program.**

Our law firm has always believed in routine reviews and keeping things current, but we've learned that if we leave it up to our clients, they seldom do it! We can only maintain the plan if the client participates in the reviews. And if the client doesn't participate, this leaves them with an outdated and ill-prepared Estate Plan. Our Annual Maintenance Program is designed to keep your estate plan current and keep you informed about estate planning matters through an annual "confirmation letter" and an annual attorney review meeting plus additional benefits.