ESTATE PLANNING CONSULTATION / 01

PREPARE THE PLANNING CONVERSATION

Broad questions only. Do not choose legal documents or enter private personal, family or financial facts here.

A helpful preparation resource from PickYourPro.ai. Fill in digitally or print. Keep your completed copy private.

Reason for seeking a conversation: first planning discussion, review, or another broad purpose

G1: planning question I want counsel to help me understand - no sensitive details

G2: another planning question to discuss privately with counsel

G3: uncertainty about existing planning work or follow-through to discuss

Consultation preferences: communication format, accessibility needs to discuss privately, timing

What I need the attorney to explain before I can compare engagement proposals

Preparation only. Not legal or tax advice, an estate-plan form, document recommendation, signing or transfer instruction, deadline calculation, or attorney-client relationship. Keep names, accounts and sensitive details out.

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MAP READINESS TO FOLLOW-THROUGH

Use labels only. This is a readiness map, not an inventory of assets or a legal document checklist.

E1: neutral existing-document label / can locate? / version clear or uncertain?

E2: neutral existing-document label / can locate? / version clear or uncertain?

E3: neutral existing-document label / can locate? / version clear or uncertain?

Firm-confirmed private intake method / information still to ask about - no credentials

Attorney-described deliverable / linked goal G1-G3 / included, separate or unresolved

Attorney-described next stage / responsible role / support included / question still open

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CHECK CONSULTATION READINESS

Tick what is ready. A checked box does not confirm that any legal planning work is complete.

- [ ] My notes contain broad goals rather than document prescriptions
- [ ] Names, asset values and sensitive family or health details are omitted
- [ ] Existing documents are referenced only by neutral labels
- [ ] Uncertain versions are marked for counsel to review
- [ ] I will ask the firm about conflicts before sharing private details
- [ ] Proposed deliverables will be defined by the attorney
- [ ] Execution and implementation support will be clarified separately
- [ ] Future-review work will not be assumed to be included

Planning questions still unclear and what I want the consultation to explain

Existing-document readiness questions to raise through the firm's private intake process

Draft review, execution, implementation or later-review scope still to clarify

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QUESTIONS FOR THE ATTORNEY

Ask about the planning engagement, not promised outcomes. Record general scope answers, not private legal advice.

Experience: how does your practice relate to these broad planning goals?

Intake: what is needed before consultation, and how is private information shared?

Deliverables: how will you explain proposed work, its purpose and exclusions?

Follow-through: what draft-review, execution and implementation support is included?

Handoff: what completion record and outstanding-responsibility explanation will I receive?

Terms: how are fees, changes, engagement end and later reviews or updates handled?

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ESTATE PLANNING CONSULTATION / 05

COMPARE THE PLANNING ENGAGEMENT

Use A and B in every box. A document package and a supported follow-through process may cover different work.

Attorney A / B / consultation dates / broad goals discussed

Relevant experience, proposed deliverables, review process and exclusions - A / B

Execution, implementation, completion record and outstanding responsibilities - A / B

Communication, fees, expenses, written terms, future review and fit - A / B

READY TO HEAR FROM PROS?

Create an account on PickYourPro.ai only if you choose, then start an Estate Planning Attorney request. Share only broad, non-confidential goals so participating pros can compete with proposals. Compare experience, scope, fees and fit. A request does not create an attorney-client relationship.

Start a request

One request. Every pro's best offer.

Participation varies. A private consultation and conflicts check may be needed before engagement.

Planning guide: https://www.pickyourpro.ai/services/attorney-estate-planning

ABA: Estate Planning Information & FAQs (official reference)

FTC: Hiring a Lawyer (official reference)

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