James Montgomery
A Professional Corporation
LAW

WHAT TO EXPECT DURING YOUR PLANNING SESSION

We have blocked one hours off on our calendar for you. All meetings are currently on Zoom only. If this will not be possible during the time you scheduled to meet, give our Client Services Director a call as soon as possible so your appointment can be rescheduled.

We use a team approach in meeting with you, providing the appropriate person for your needs. Jim Montgomery will lead our team and you may be meeting with others as well. We are expecting to meet with you and your spouse, if applicable. Please make sure you both will be available during the meeting time so that you can make the most of your meeting. Please let us know who will be attending by filling out the Attending Parties sheet in our packet, or calling our Client Services Director prior to our meeting.

We will begin your meeting by sharing some background and history about our firm, then discuss your plans, desires and objectives for protecting your family and assets. We will introduce to you the available tax avoidance strategies, guardianship and disability planning, and various estate planning options and discuss how choosing each alternative might affect your estate planning. We will then help you design the best plan to achieve the goals you identified while giving you the best security and peace of mind. We can have this plan in place protecting you, your family, and your assets within days after your meeting.

However, let's try to determine *before* you walk in if our unique approach to legal counsel will suit your needs and desires. As soon as possible, please review the enclosed document called "How Our Law Firm is Different" for an overview of our approach. Then answer the following questions:

1. If you discover you are really looking for a one-shot transaction rather than for a law team who provides regular guidance and protection, stays informed about you and the changes in your life, and guides you and your family throughout, please call our offices right away so we can instead refer you to a number of lawyers who operate on a single transaction basis. --or--

2. If you are ready to embark on a long term relationship with your own counselor who will help you plan for the most protection and peace of mind for you and your family, please review the document called "How to Prepare for Your Estate Planning Session."