

PROTOCOL FOR EXECUTION OF ESTATE PLANNING DOCUMENTS

In order to facilitate the prompt and efficient execution of your estate planning documents, we follow the following protocols:

- ❑ All documents will be furnished to you prior to your appointment to execute them.
- ❑ Please carefully read and approve all the documents furnished to you prior to your appointment. If you have any questions, please call or e-mail us as soon as possible. Please do not wait until your appointment to ask questions or request changes to your documents as this will delay the execution procedure.
- ❑ Bring your driver's license or other form of identification with you to the execution appointment. Our notary public will require proof of identification in order to legally notarize your signature.
- ❑ We will be ready for you to execute your estate planning documents at the time of your appointment. We will furnish any necessary witnesses and the notary public.
- ❑ Please allow 20 minutes for execution of your estate planning documents.
- ❑ After your documents are executed, you will be free to leave. We will copy your documents and promptly mail the originals to you. We will retain the copies in your client file.
- ❑ Please do not bring young children to the appointment with you. We will require your undivided attention during the execution process.