Interviewing an Estate Attorney

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14 questions to ask when looking for an estate planning attorney.

"Ask friends and advisers for recommendations, and interview several candidates with the same list of questions before making your decision."

Most people have some ideas about how they would like things handled after they die, but many haven't faced the sobering task of putting their preferences on paper. Planning for the care of family and handling of assets upon one's eventual death, and having a qualified attorney document those plans in the form of a Will and/or Trust(s) is the essence of estate planning. Sharon Weaver, president of Mission Financial Planning, explains estate documents this way, "Think of Wills and Trusts as instruction manuals for handling what's left when you're gone. Without well written directions, what eventually gets assembled may not look at all like what you were trying to build."

Read what Weaver has written on the need for estate planning and what to look for in an estate attorney on her company's website
www.missionfinancialplanning.com.

To get proper estate documents drafted, financial planners usually recommend using an attorney specializing in estate law. To find an estate attorney, Weaver suggests that people ask friends, colleagues and their financial planner for referrals to estate attorneys they've used, and recommends interviewing several before making a decision. "Have questions prepared in advance and interview several candidates from the same list of questions" is her tip for finding the best fit.

Below is a list of 14 questions that Mission Financial Planning has created for interviewing a prospective estate attorney:

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• “What percentage of your practice is devoted to Probate, Trusts, & Estate Planning Law?”

• “How long have you personally been doing estate planning?”

• “What is your estate planning process?”

• “What will you need from us?”

• Refer to an area of concern and ask about how they’d handle it. For example “We have two minor children, what are some strategies you might incorporate?” or “My brother has special needs, what do we need to take into consideration?” or “I own my own business, how would you incorporate that into the plan? • “Will you write general, financial and/or medical powers of attorney for us?”

• “Do you provide Health Care Directives?”

• “How often do you recommend that we get together to review these documents after they’re written?”

• “How will I know if a change is necessary due to a change in estate or tax law?”

• “How do you charge for estate planning?” (example: flat fee for the documents, hourly charges for retitling assets)

• “What do your fees include?”

• “What services are not included in that fee?”

• “Does your fee include a regular review of my legal documents?”

• "How do you go about communicating with my other advisors (financial planner/CPA)?"

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Taking an intentional approach to finding a good attorney will help assure the quality of your estate documents now, and perhaps an easier execution when the time comes to use them.

Mission Financial Planning is an advice-only financial planning firm. They take a comprehensive approach, consulting on personal and small business financial planning.

For more information call 913-948-9694 or visit www.missionfinancialplanning.com.