CAROLINA FAMILY ESTATE PLANNING ROADMAP

BETWEEN MEETINGS

YOU		CFEP
	WELCOME	
Please complete and send your Vision Meeting Form with any existing estate planning documents one week in advance of your Vision Meeting.		Our Legal Team will perform a Preparatory Review to identify probate, tax, or asset protection concerns. If you have prior estate planning documents, an Attorney will complete an Estate Planning Document Review.
	VISION MEETING	
Please review the Design Meeting Considerations handout and complete Family Information Form.		Our Team will prepare for your Design Meeting. Your Attorney will review your file and goals.
	DESIGN MEETING	
Please complete your personal planning worksheets. Gather any financial information requested by us. Provide any other information requested by your Attorney.		Your Legal Team will draft your documents and Asset Detail Report. A second Attorney will review your documents. After a final proofreading, your documents are printed and assembled in your Estate Planning Portfolio.
	SIGNING MEETING	
Please provide any financial information requested at least one week in advance of your Funding Meeting.		Your Funding Paralegal will finalize your Asset Detail Report and prepare your funding instructions and forms. Your signed documents will be scanned to digital format.
	FUNDING MEETING	
Please carry out any tasks assigned by your Funding Paralegal during your Funding Meeting.		Your Funding Paralegal will submit all deeds and account change forms signed during your Funding Meeting.
	FUNDING CHECK-IN	
	FINANCIAL MEETING	
	VIP INNER CIRCLE	
We plan to do such a great job that you will rave about CFEP to your friends and family.		
	PEACE OF MIND	

THE VISION METHOD

WELCOME

Our friendly *Client Welcome Specialists* are happy to answer your questions about our Vision Method, register you for a Seminar, schedule your Vision Meeting, and provide support every step of the way.

VISION MEETING

We will get to know you, your family, and your goals to understand your concerns and opportunities. We'll discuss where you are now and what you want for you and your family's future. After carefully refining your goals, you and your *Client Relationship Manager* will determine whether we're a good fit to work together.

DESIGN MEETING

Your *Attorney* will help you design your custom plan, while carefully explaining each role or aspect of the plan and helping counsel you through each detail of your plan.

SIGNING MEETING

Your *Attorney* will recap your plan and review your Asset Detail Report with you. In the presence of two witnesses and a notary, you will sign your documents.

FUNDING MEETING

Your *Funding Paralegal* will review your final Asset Detail Report with you, go through your funding package step by step, and give you your finalized Estate Planning Portfolio. Your funding package will include detailed instructions and forms for each asset you own. Note: For Will-based plans, a Funding Meeting is not included. However, your *Funding Paralegal* is available as needed after your plan is signed to assist you with beneficiary designation forms.

FUNDING CHECK-IN

During this scheduled phone call, your *Funding Paralegal* will check on your progress updating accounts and answer any questions that may have come up during the funding process.

FINANCIAL MEETING

Optional: During the planning process, we can often identify financial solutions that may be a good complement to your estate plan in order to accomplish tax, legacy, or asset protection goals. In such instances, we may recommend a complimentary meeting with one of our vetted financial professionals to further explore such solutions.

VIP INNER CIRCLE

You will continue to receive our print and email newsletters and are always welcome to contact our office if you need a referral to one of our vetted legal, financial, or other professionals. If you enroll in the VIP Inner Circle program, you'll have ongoing access to CFEP for questions regarding your plan, funding assistance, word-processing changes, priority access to client events and seminars, an annual review meeting, and discounts on future planning upgrades as your goals may change. If you engage CFEP for Trust-based planning, your first-year enrollment in the VIP Inner Circle program is included with your plan.

PEACE OF MIND

We intend to exceed your expectations so thorough that you will rave about CFEP to your friends and family, and rest easy knowing you've planned for a secure future.

Our Guarantee: We promise you will receive competent legal services, to the best of our abilities. At any time between now and 60 days after your Signing Meeting, if you are not completely satisfied with our services, we ask that you, (1) please tell us immediately, and (2) give us an opportunity to make it right. If we cannot make it right, we will refund 100% of your fee.