


















“RED FLAGS”

-  • ***Not a licensed attorney:***
Why trust your family to unqualified and irresponsible agents?
-  • ***No firm name mentioned:***
Who really is sponsoring the seminar and doing the work?
-  • ***No local address listed:***
Will you be able to find them later?
-  • ***“800” numbers:***
Where is their real office?
-  • ***Satellite offices:***
How long will they be there?
-  • ***Financial advisors who claim they do estate planning:***
What do they really want to sell you?
-  • ***Giving specific account #'s and financial info:***
Is your financial information safe? What are they going to use it for?
-  • ***Appointments are not with the attorney:***
Are you receiving poor and incorrect information from unqualified persons?
-  • ***A lawyer only “reviews” or “prepares” documents:***
Who is really writing your documents?
-  • ***Deposits or fees before you meet with the attorney:***
Why do you have to pay before your 1st appointment?
-  • ***Attorneys who have been suspended or disbarred:***
Ask the attorney and check with the state bar before you pay.
-  • ***Attorneys who are new or inexperienced:***
How many trusts have they done and how many years have they done trusts?
-  • ***Attorneys who do other types of law:***
Do they really know what they are doing?
-  • ***Attorneys who also do probate:***
Do they make money even if they make a mistake?
-  • ***Fees based on your wealth:***
Why pay more just because you have more money?
-  • ***Charges for phone calls, notary & recorder fees, deeds, etc.:***
How much will it really end up costing?
-  • ***No clear commitment to how long it will take:***
How long will you have to wait for a rough draft?

**BE CAREFUL ABOUT WHO DOES YOUR
LIVING TRUST OR ESTATE PLANNING.**