

ESTATE PLANNING PROCESS

1

CONTACT US

Contact us to schedule an Initial Consultation and then review the pre-meeting information on our website under FAQs

2

INITIAL CONSULTATION MEETING

Meet with Ken Pajak to discuss your needs, gather information, and determine the scope and cost for services

3

REVIEW AND SIGN LEGAL SERVICES AGREEMENT

We will send the agreement to you via DocuSign or mail

4

DELIVER RETAINER/ADVANCE PAYMENT

We will issue a Trust Request, which may be paid online or by check

5

ADDITIONAL INFO

Gather and provide any additional information

PAJAK LAW, PLLC

6

DRAFT DOCUMENTS

We will draft your Wills and Advance Directives and send them to you electronically for review and comment

7

DISCUSS DRAFTS

Discuss drafts by phone, video, or an in-person meeting with Ken Pajak

8

FINALIZE DOCUMENTS

Documents are finalized and an in-office signing ceremony is scheduled

9

SIGNING CEREMONY

We provide the required Notary and witnesses and perform the signing ceremony

10

DELIVERY

We deliver the original signed documents to you in hard copy and pdf



Check it off
of your list!