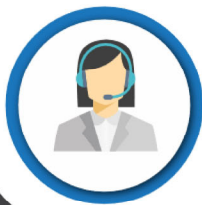


What is the Process for Setting Up Your Estate Plan (Revocable Living Trust)?

With experience, we have made the process of setting up estate plans in a very fast, efficient, and painless way. We are far more hands-on and accessible than most other firms. For communication, you can send us emails or texts, call us or we can have a Zoom call if necessary. We use technology for everything. If you already formed your trust with us and your life circumstances have changed, we can easily make any updates or amendments, as all your data is stored in a sophisticated software platform. Below is a basic overview of the process:

STEP ONE INITIAL CONSULTATION

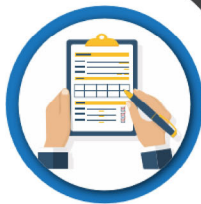
If you call us and I or my staff is readily available, we will ask you certain questions about your family situation, immigration status, your assets, how many properties you own, and any special circumstances. From there, we will provide you with my recommendation and/or options to best fit your situation. I will also go through the timeline, costs, and overview of the step-by-step estate planning process. If I or a staff member is not available, we can also set up a time that is most convenient for all parties. This can be done via telephone call or Zoom call.



STEP THREE

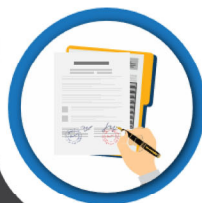
WE WILL START DRAFTING YOUR ESTATE PLANNING DOCUMENTS

Once we get the questionnaire and Grant Deed(s) (if applicable) from you, we will prepare the documents. Generally, it takes about a week as we are FAST and EFFICIENT. We will then share the documents with you on a secure site where you can review, ask questions, make comments and/or changes. If necessary, we will revise and further upload the documents. When you are ready, the documents will need witnessing (for the wills) and notarization for most other documents. We prefer you do this through us so we can meet and go over any questions or concerns you may have, but you are free to do that on your own (not covered by any prepaid legal insurance plan).



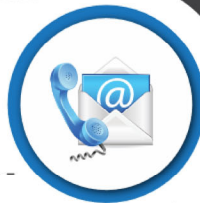
STEP FIVE SIGNING

Once you are ready to go and understand everything, please email or call us at (510) 516-2889 and we will schedule a signing that is convenient for all parties. The signing should take about 30-40 minutes and I will go over the documents as you sign and answer any questions. Right after you sign, our staff will assemble your binder of original documents. You will get a binder, a thumb drive with your scanned documents, including instructions on what to do next.



STEP TWO INSTRUCTIONS

I or my staff will send you a questionnaire and PowerPoint on estate planning basics. Please read the PowerPoint first so that you better understand why you may need what was recommended. From there, you will need to fill out the Estate Planning Questionnaire as complete and careful as possible (as we want to make this process efficient), so please think about the people you want to choose as executor, trustee and/or guardian ("fiduciaries"). Nothing is set in stone, and we can always make changes later. If you own real estate, we will also need a full, scanned copy of your grant deed; this is necessary for us to prepare your new Trust Transfer Deed so that your property officially becomes a part of your trust. If you want to limit liability, please ask us about the LLC formation process.



STEP FOUR

EMAIL OR CALL FOR UPDATES/QUESTIONS

Once you've reviewed, you may have questions, comments, corrections, or changes. Please let us know via email, and if we need to have a call, we can do that.



FINAL STEP FUNDING YOUR TRUST

We will give you an instructional page on how to fund your trust with the Certificate of Trust and provide details on what is required to record any Trust Transfer Deed(s) (if applicable) for real estate.

DONE CONGRATULATIONS!

Once you do that, you are done! Please feel free to contact us for any updates/amendments in the future. We'd be glad to assist. If you have friends or family that need help avoiding probate, just have them mention your name as we give discounts to our client referrals.

