

## Your Estate Planning Roadmap to Peace of Mind

Congratulations on taking the first step towards planning for your future!



You received your meeting confirmation, email with video and link to our strategy form in preparation for our meeting



STRATEGY MEETING



Retain Miller & Miller Law Group to draft an estate plan that will give you piece of mind



Draft Your Estate Planning Documents & Schedule Signing Date



Review and Discuss



SIGNING

We encourage you to fill out the strategy form so we can review prior to our meeting. This information will help us make the most of your time with Daniel Miller, Esq.

What to bring:

- All financial documents
- Prior estate planning documents
- Completed Strategy Form

Before we begin drafting your Estate Plan, we will discuss who would be appropriate for each role in your estate plan

Please allow 7-10 business days for your estate plan to be completed. We will email your documents to review along with a link to schedule your signing

Questions or Changes? No worries! We want to be sure your estate plans meets your wishes. Use the link in your email or call our office to schedule a follow-up

We will provide witnesses for your signing. You will leave with your estate plan, a digital copy of your estate plan, along with information on how and where to safeguard your documents