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A PROFESSIONAL LAW CORPORATION

5 MOST COMMON MISTAKES PEOPLE MAKE WHEN CHOOSING AN ESTATE PLANNING ATTORNEY

MISTAKE 1: THINKING ANY ATTORNEY CAN DO THEIR ESTATE PLANNING.

Any attorney can offer estate planning services, but very few attorneys have the experience and training to be excellent estate planning attorneys. Estate planning is a highly complex area of law that demands years of study and experience to understand it well enough to provide excellent results for clients.

MISTAKE 2: THINKING ALL TRUSTS ARE THE SAME.

There is no standard for what is included in a trust agreement and therefore the quality, clarity and effectiveness of trusts vary widely. Excellent estate planning attorneys understand the objectives of each client and from that determine exactly what language to put in a trust to accomplish those specific goals. Some attorneys merely purchase trust document forms and fill-in-the-blanks without fully understanding the implications of mixing and matching separate clauses to form such an important document.

MISTAKE 3: CONFUSING ESTATE PLANNING WITH DOCUMENT PRODUCTION.

Excellent estate planning attorneys help their clients understand what decisions they can make today that will help them and their family now, as they age and when they are gone. Less skilled attorneys are in the business of producing documents and do not provide their clients with the planning part of estate planning.

MISTAKE 4: CHOOSING THE LEAST EXPENSIVE ATTORNEY.

Clients who choose to use the least expensive estate planning attorney take the risk that there will be very expensive surprises in the future. Excellent estate planning attorneys are in high demand because they do the job right, and they charge appropriately for their time.

MISTAKE 5: CHOOSING AN ATTORNEY THAT IS NOT FAMILY-SAVVY.

Excellent estate planning attorneys are family-savvy. They know how to draft an estate plan that accomplishes the client's goals while avoiding decisions that will tear the family apart. Their attention to family dynamics now makes the survivors' job much, much easier.