Guidelines to Select a Trust and Estate Attorney

Completing estate documents is one of the most important stewardship tasks we have. Every adult should have a Last Will and Testament, Power of Attorney and Health Care Directive. Most adults also need a Living Trust, to protect assets and avoid probate court. So, if you are reading this guideline-Congratulations! It means you are taking an important step forward to find a competent attorney to assist you.

This is a brief outline to help you select a licensed attorney that is a good fit for you. The following are suggested steps to help you identify and select an attorney:

1. Identify at least 3 attorneys to interview. Check your State Bar Association to identify attorneys licensed to practice and in good standing (status of sanctions or complaints). Many attorneys obtain certificates in Trusts and Estates. For a referral, consider asking trustworthy professionals such as your banker, CPA or tax preparer.
2. Request "an initial no-cost consultation", usually a 30-60 minute call. Be prepared to say 1) I don't have any documents, or 2) I have documents but need an updated review.
3. At the initial consultation, be prepared to quickly share:
    a. Family status (I'm single, married, divorced, widowed, with x number of children or grandchildren, a blended family, etc.)
    b. Property overview (I own a home, have other real estate, retirement accounts, investments, a family business, and rough value of all assets)
    c. Inheritance Goals (I want to leave inheritance for spouse, children, grandchildren, and to charity)
    d. Special situations (Example- spouse is very ill, we must do this right away).
4. Interview questions to ask the attorney at the initial consultation:
    a. Is Trust and estate planning your primary focus? Do you have certifications in Trust and Estate law?
    b. Can you provide documentation that details your services and the process?
    c. We are charitably minded. How will you guide us with gifts to charity?
    d. Do you assist in funding living trusts, such as getting real estate deeds transferred, assistance with bank or brokerage accounts, 401-K, etc.
    e. What costs or range of costs are involved?
5. Our web site has a FREE, private Wills Planner, where you can gather all of your information ahead of time, on-line and publish a PDF report. Go to www.cfa.charity and navigate to "How to Give" and Bequests. Then open up "Plan My Will".

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