HIGHPOINT
LAW OFFICES PC

The LifePlan Process ™

1. **Initial Phone Call**
    - This call with a Team Member is to assess your needs and schedule your Vision Meeting.

2. **Vision Meeting**
    - At this meeting with an attorney, you will educate us about your family, your assets and your estate planning goals. We'll recommend a plan, address any issues/questions and schedule a Design Meeting.

3. **Design Meeting**
    - At this meeting you'll meet with your attorney to work out the details of your plan. (Sometimes the Vision Meeting and Design Meeting can be combined into one meeting). After the meeting, you'll attorney will draft your custom estate plan.

4. **Document Review Meeting**
    - During this meeting you and your attorney will review your draft custom estate plan (in office or by Zoom). Your attorney will explain each document and how your plan works. You can ask questions and request changes, if you like.

5. **Document Signing Meeting**
    - You will execute your estate plan at an in-office signing meeting. After the meeting, we will assemble your original documents in a leatherbound *Estate Planning Portfolio*.

6. **Redbook Meeting**
    - At your Redbook meeting your attorney will present you with your complete *Estate Planning Portfolio*, explain the organization of the portfolio and provide guidance on how to store it.

7. **Additional Services (if applicable)**
    - Preparation of an Asset Table; Family Meeting; assistance with trust funding.