KAISER LAW GROUP
Estate & Legacy Planning
Purposeful Estate Planning for the Multi-Millionaire Next Door®

ESTATE PLANNING PROCESS AND TIMELINE

TIME BETWEEN MEETINGS: 1-2 WEEKS | 2-3 WEEKS | 2-4 WEEKS

INITIAL CONVERSATION

We will learn about your estate planning needs and determine if our office is a good fit to assist.
If we can assist, we will discuss the next steps in the process for moving forward.
If not, we would be happy to give you a referral.

Lorie Salcedo
Client Coordinator

STRATEGY SESSION

We will have reviewed your existing trust and the asset information you provide. We'll discuss your goals and planning options by answering questions, addressing issues and ultimately design a customized estate plan to take care of your loved ones.

Curtis Kaiser
Founding Attorney

ENGAGEMENT

At the conclusion of the Strategy Session, or a few days following, when you come to a decision as to whether we are the right fit for your family, we will schedule your future appointments and collect payment for our services.

VISUAL SUMMARY AND DOCUMENT REVIEW

We will prepare a plain English Visual Summary to ensure we are all on the same page.

We also offer an optional Document Review to go over details of the estate planning documents.

Melissa Jenks
Estate Planning Paralegal

NOTARIZATION

Our team members will assist you with executing your estate planning documents.
Any changes to your plan or questions should be addressed during the Visual Summary or Document Review meeting PRIOR to your signing. We will then scan your documents and you will leave with your signed binder.

Lorie Salcedo
Client Coordinator

(562) 343-2843 www.kaiserlg.com 1306 Park Ave, Long Beach, CA 90804

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LEGACY PROGRAM
ASSET ALIGNMENT PROCESS AND TIMELINE

2-3 WEEKS

ASSET ALIGNMENT REVIEW

Next up is a detailed review of your assets. We will review the assets that you've disclosed to us and confirm that we have all necessary information from you.

1-2 WEEKS

ASSET ALIGNMENT RECOMMENDATIONS & EDUCATION

We will discuss how and why we will be aligning your assets consistent with your overall estate plan. We will then provide instructions to your various financial institutions, requesting that the changes be made on their records.

6-8 WEEKS

ASSET ALIGNMENT VERIFICATION

Now, we verify. Together, we will review your assets to confirm that your financial institutions have provided proof of the asset alignment. In preparation, make sure you have collected any correspondence from the last six weeks related to any ownership and beneficiary changes.

ONGOING MEMBERSHIP

LEGACY PROGRAM

The initial planning is complete, now let's keep up to date! Our Legacy Program provides for ongoing communication, review and adjustments to your plan and continuous alignment of assets.

Family Care Meetings can be scheduled at any point following your signing meeting. These meetings are critical to having your loved ones be as informed and prepared as possible.

We will reach out for Biennial Reviews and you will reach out to us anytime if questions arise or you need to meet.

We are here to help you and your family!

Michelle Saye
Asset Alignment and
Trust Administration Paralegal

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