



Estate Planning Procedures

OUR PROCESS

Our goal is to make estate planning as easy and stress-free as possible. Since most people prefer to know what's ahead, we have outlined our estate planning process, so you can proceed with confidence as you take steps to protect yourself and your loved ones.

THE INITIAL CONTACT

After you reach out to us, whether you were referred by someone or found us on your own, one of our staff members will contact you to gather some preliminary details, find out the specific reason for your inquiry, and schedule an Initial Appointment with one of our estate planning attorneys. The Initial Appointment takes just a few minutes and is free of charge. Before the Initial Appointment you will receive a one-page initial questionnaire to complete and return via email, as well as our digital guide to estate planning. The Initial Appointment is designed to match you with an attorney who can help you with your estate planning needs and give you a chance to ask basic questions.

THE INITIAL APPOINTMENT

The short 10–30-minute meeting is held by phone, online, or in-person, depending on your preference. During the Initial Appointment, you will speak with one of our estate planning attorneys. If you and the attorney think you would work well together, we will schedule an in-depth Planning Session, and send you a detailed questionnaire to complete and return via a secure link for the attorney to review in advance of meeting. You are not obligated to move forward with the estate planning process if you choose not to do so after the Planning Session. There is a nominal fee for the Planning Session,

but the amount paid is credited toward the cost of your Estate Plan if you choose to move forward with the estate planning process. You will also be sent a payment link for the Planning Session with the appointment confirmation.

THE PLANNING SESSION

The Planning Session is a no-obligation meeting with the attorney; it typically lasts about one hour and is done in person, by phone, or online.

We ask that you return your questionnaire at least two business days in advance of the Planning Session. At the Planning Session, we will go over your questionnaire, answer your questions, and make sure we understand exactly how you wish to provide for your loved ones in your Estate Plan.

The topics we discuss will include your goals, your plan for distributing your assets, end-of-life medical decisions, who should be authorized to carry out financial and medical decisions on your behalf. We will also discuss your potential need for a trust and when adult children should inherit money or property, among many other areas about which you may have concerns.

We will make recommendations and decide with you which documents you need to sign, the cost, and any additional actions you need to take. After agreeing on a plan, you will sign a letter of engagement, which will be our contract for completing your Estate Plan. We then schedule a date for you to Review your documents and another time to come in to sign those documents with an attorney. Payment for the Estate Plan is made after you sign a letter of engagement and schedule the Review.

THE REVIEW

After you sign a letter of engagement and pay for your Estate Plan, we will draft the documents and may contact you for additional information or to ask clarifying questions. We typically notify you of these questions by email but may also set up phone call or virtual calls to discuss them.

It generally takes two to three weeks to draft the documents. Depending on the attorney's recommendations and your specific needs, the Review is often as simple as sending your documents via email or secure link. Once you have finished reviewing the documents in your Estate Plan, one of our attorneys will be available to answer additional questions or discuss potential revisions. If no changes are required, you are ready for the Signing Meeting, which must take place in our office absent extenuating circumstances.

THE SIGNING MEETING

When you come to the office, you will begin by initialing and making any necessary selections on the documents before you begin signing them. Trust Agreements, Deeds, Powers of Attorney, and Advance Medical Directives are signed in the presence of a witness and a notary, both of which we provide. Wills are signed in the presence of one additional witness, also provided by us. Since you will have reviewed your documents already, the Signing Meeting typically takes no more than thirty minutes.

When you leave the Signing Meeting, you will receive your original documents and copies to store in a secure location, which we will discuss with you at the Signing Meeting. You will also receive a digital copy of the documents you have signed. After the Signing Meeting, you will receive a formal letter stating your Estate Plan is complete and ending our attorney-client relationship. However, after the Signing Meeting, we will keep in touch with you, and you can always contact us at 703-883-0880.

We look forward to meeting you and helping you create an Estate Plan that protects you and your loved ones.

ABOUT US

Briglia Hundley was founded in 1993 and practices throughout the mid-Atlantic region. Our practice features attorneys who have been listed as "Legal Elite" by Virginia Business magazine, named to Super Lawyers, and listed in Best Lawyers.

We are a forward-thinking law firm that relies upon our experienced and energetic attorneys to reliably and responsibly meet the legal needs of our clients in Virginia, Maryland, and the District of Columbia.

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