

Finding the Right Estate Planning Firm

What to Look For • What to Ask • Red Flags to Avoid

Why Your Choice of Attorney Matters

Estate planning is one of the most important legal decisions you will ever make. The right attorney does not just draft documents — they create a comprehensive strategy that protects your family, preserves your assets, and reflects your values. Choosing the wrong firm can leave your family exposed to probate, unnecessary taxes, and legal disputes.

5 Questions to Ask Every Estate Planning Attorney

1. Do you focus primarily on estate planning?

General practitioners may not stay current with trust and tax law changes. Look for a firm where estate planning is the core focus.

2. How do you handle updates to my plan?

Life changes — marriage, children, divorce, new assets — all require plan updates. Ask whether ongoing maintenance is included or billed separately.

3. What documents will my plan include?

A complete estate plan typically includes a revocable living trust, pour-over will, financial power of attorney, healthcare directive, and HIPAA authorization.

4. Do you serve families like mine?

Every family is different. Ask whether the firm has experience with your specific needs — blended families, minor children, business ownership, or multi-state property.

5. What happens after I sign my documents?

Signing is just the beginning. The best firms help with trust funding, beneficiary designations, and ongoing education.

Red Flags to Watch For

- ✗ One-size-fits-all pricing with no consultation
- ✗ No discussion of trust funding or asset titling
- ✗ Pressure to sign documents the same day
- ✗ No plan for ongoing reviews or updates
- ✗ Attorney is unfamiliar with your state's specific laws

**At Wood Legal Group, we believe estate planning is about relationships, not transactions.
Schedule your consultation today at www.woodlegalgroup.com/book**