

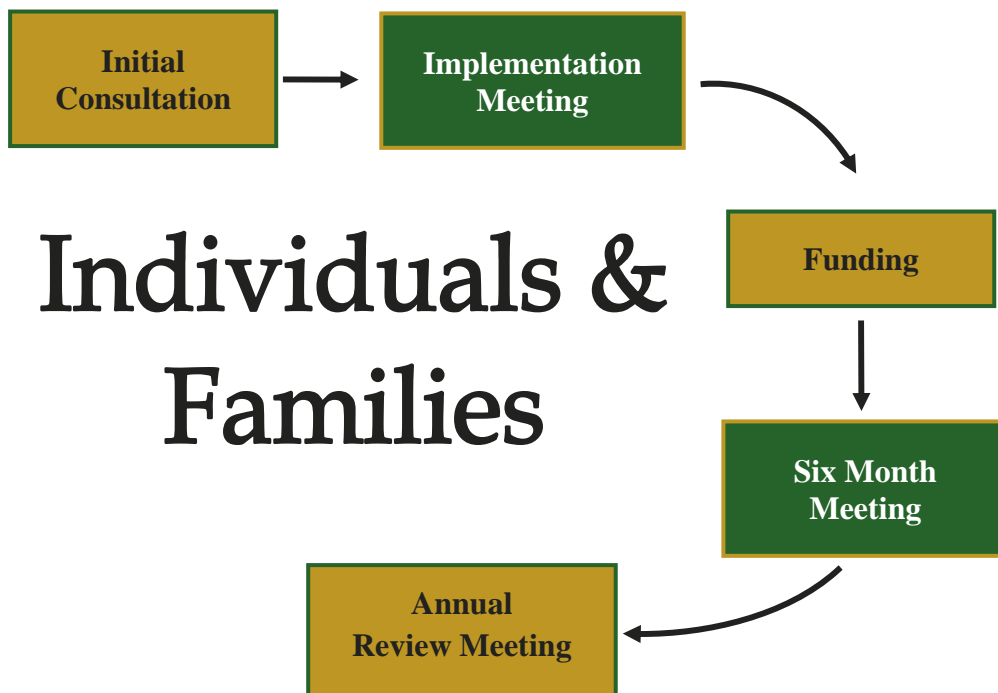
Estate Planning



Definition of Proper Planning

I want to control my assets during my lifetime, so I can do what I want to do. I want to provide for myself and my family in the event of my disability. I want to be able to give what I have to whom I want, the way I want, and I want to save every last tax dollar, professional fee, and court cost possible.

The law firm of Eagle & Fein inspires families to plan to meet their goals and objectives based on a unique process focusing on the definition of proper planning. Our philosophy is to make the complex simple by taking the time to understand our clients' concerns, identify potential problems, and seek advantageous solutions that provide comfort and confidence to the families we represent. Our expertise and processes best enable us to meet our clients' goals and objectives in a practical and straightforward manner.



Our Process

Initial Consultation

The first step is to meet with you, your spouse and other professional advisor(s) as appropriate. At this meeting we listen and learn about your needs. Based on what we learn we can help you develop your goals and objectives and make recommendations to accomplish them. At the end of this meeting we discuss our anticipated fees.

Implementation Meeting

At the implementation stage we review all of your estate planning documents with you, confirm that they meet your goals and objectives and supervise the signing of your estate planning documents. Our goal at this meeting is to give you the confidence to walk away from our office with the comfort that your goals and objectives that you have for yourself and family have been accomplished.

Funding

Your estate plan only works to meet your goals and objectives when it is properly linked together with your assets and beneficiary designations. We work with you, your advisor(s) and other appropriate third parties as required to change ownership and beneficiary designations ensuring they are properly linked together with your estate plan.

Six Month Meeting Check-Up

We meet with you, your spouse and advisor(s), as appropriate, to verify everything has been executed and verified in accordance with the plan. We use this time to address any concerns and finalize any decisions that may have been deferred. We also discuss with you the opportunity to take advantage of meeting with us annually.

Annual Review Meeting

Although not required, but highly encouraged, many of our clients desire to meet with us annually after we implement their estate planning. This is the one moment in each calendar year that you focus on what you have accomplished for you and your family and we focus on what we accomplished for you. If desired, we ask that you, your spouse and advisor(s) meet annually to:

- Catch up on changes in the health and well-being of all members of the family
- Review the scope of your estate plan and verify that it is still appropriate
- Review changes in financial circumstances and to what extent they might alter your plan
- Verify ownership and beneficiary designations of any newly acquired assets
- Update your legal documents for changes in family goals or circumstances, technical changes brought about by court decisions, State or Federal legislation, and any attorney improvements
- Discuss any other matters that may require attention

