



5 Keys to Choosing an Estate Planning Attorney

After years of working with many, many clients, we feel pretty good about knowing what makes a plan work and what doesn't. We've carefully designed our unique planning process to overcome common pitfalls that can be problematic with more traditional estate planning attorneys. Here are 5 things we think your estate planning firm must have in order to help you create a plan that fits perfectly with you and your unique set of circumstances:

1. Strong ongoing attorney/client relationship. Personal relationships that last for years help us to better serve your needs and the needs of your family. If the law firm that drew up your will seems disinterested in you, then you might need to look somewhere else.

2. Knowledgeable law firm staff. Compassionate staff who can assist clients with asset titling and other vital planning questions are the foundation of our firm. Their passion is helping you! If you dread dealing with the staff at your estate planning firm, then you might need to look somewhere else.

3. Technology. To maintain accuracy, even in the most customized plans, takes cutting edge technology. Our innovative use of technology allows cost-effective future updating of legal documents.



This means more accurate information for you, right when you need it. If your estate planning firm is still using cut and paste to draft your will or trust, then you might need to look somewhere else.

4. Constant education. Education is the foundation of knowledge and power. We are committed to continually educating our staff, clients, potential clients, and the community through e-newsletters, workshops, paper newsletters, speaking engagements, etc. In addition, our attorneys attend multiple continuing education conferences every year. If your estate planning firm wants you to blindly trust them, without educating you or your family in the process, then you might need to look somewhere else.

5. Complete implementation. We see your plan through to the very end. We don't just create a will, we create an entire estate plan, which includes asset titling, help with beneficiary designations, updating of legal documents and educating family members along the way. It is our passion and promise to be with your family at every step. If your estate planning firm hands over a document and that's the end of it, you might want to look somewhere else.

From Dave's Desk...

"Keep it between the ditches!" That's our family's joke when a car wheel gets off on the shoulder of the road. We even joke with 5-year-old Bailey as she rides her bike on the sidewalk, "Keep it between the ditches!"

Of course, in reality, good safe driving or bike riding is a lot more than that. Just like good estate planning is MUCH more than simply "getting a Will." Our process is designed to cover all the pitfalls that could mess up your plan. Let us help keep your estate out of the ditch and make it easy on your family later. They will be grateful you did.



INTRO TO EDWARDS GROUP: WILLS AND TRUSTS ORIENTATION

Our Intro to Edwards Group workshop is a great way to find out if Edwards Group is right for you and learn about the basics of estate planning. At this 1-hour workshop you will learn about how we work, key steps in our process and even how our fees are calculated. (See the next page for more about our fees.) **The other good news is, anyone attending this workshop gets \$200 off their Initial Meeting fee with an attorney!**

So, who should attend?

- Those who are considering Edwards Group for estate planning.
- Those who already have an estate plan but are unhappy with that plan.
- Those who know they should plan, but are intimidated by the process.

What will you learn?

- How our innovative process can protect your family.
- How we guide you through each step in the process.
- What happens at each meeting in the planning process.
- How our Dynasty Membership program works and why almost 100% of our members renew every year.

4 Easy Ways to Get Started Planning

Edwards Group has 4 easy steps to get you started on your planning:

1. Sign up for our weekly e-newsletter.
2. Call us for a complimentary 10-minute phone consultation to address any doubts or questions you may have.
3. Attend an Intro to Edwards Group workshop (and earn \$200 off your initial meeting fee).
4. Schedule an Initial Meeting with an attorney.

WHAT TO EXPECT AT YOUR INITIAL MEETING

One of the easiest first steps toward planning is scheduling an initial meeting with us. You may be thinking, "Easy?!? To meet with an attorney? Yeah, right. Intimidating is more like it!" But we promise, our attorneys are really quite nice. Here's what you can expect if you schedule an Initial Meeting:

It will be very relaxed. Our attorneys don't even wear ties! (Well, they do if they need to go to court, of course, but not otherwise.)

The main focus of the meeting is you! Your goals, your family, your concerns. Basically, "what brings you to Edwards Group?" We're all ears.

We use everyday language, not legal jargon. All you need to do is just tell us about you and your family - - and what you think could go wrong later if you don't plan well. We will help you by asking questions and suggesting issues that you may not have considered.



We will explain the steps in our planning process.

By the time you leave our office, you will understand the timeline, what will happen next and what it will cost. We don't like surprises anymore than you do, so we've carefully thought through it all.

There will not be any sales pitch.

Our job is simply to educate you about the various planning options or risks that may come up in your family situation, based upon our extensive previous experience. Then we will explain the planning levels, what each one covers, and the fees for each option. After that, it is our job to just sit back, answer any questions you might have, and allow you to choose what works best for your unique

family situation.

It will last about 90 minutes. The meeting usually last 1-2 hours, so 1 1/2 hours is a good guess. We always block off 2 hours on our schedule, so we can meet as long as necessary to understand your situation and explain our process to you.

7 RISKS OF AN OUTDATED OR SIMPLE WILL

A lot of people have old wills lying around that they just hope will somehow do the job when the time comes. And surely, we've all seen a LegalZoom commercial trying to convince us that Internet estate planning can be as effective as real live lawyers. At Edwards Group we deal with the problems that arise from outdated wills or simple fill-in-the-blank wills everyday. Here are some things to keep in mind:

1. Changes in the laws or tax laws since drafting of your will could cause complications or unintended consequences.
2. Wills are designed to go through probate. The extra expense, delay and public exposure that go with a court probate process may be avoided when other estate planning tools are used.
3. Many wills do not have adequate provisions for protecting the inheritance you leave to your loved ones. Risks such as future divorces, lawsuits and financial struggles can be mitigated with proper planning.
4. Is the executor you chose in your old will still the best person for the job? Circumstances can change. Will the responsibility be a struggle for them because of a busy schedule, lack of attention to detail or inexperience?
5. Is your old or simple will coordinated with ALL of your beneficiary designations, joint ownership and account titling? Unless you are very intentional about your financial organization, the way you have set up accounts and insurance policies could undo the wishes stated in your will.
6. Have your life circumstances changed? Have you gotten married, divorced, had children or grandchildren since your last will was drawn up? Is your wealth greater or lesser than before? If so, any of these factors can impact how things play out if your old/simple will has to be used.
7. Have you planned for possible nursing home costs? Even if your old will is okay right now, your wishes could be undone if high nursing home costs eat up most or all of your savings prior to your death.



OUR MONEY BACK GUARANTEE

What kind of an attorney offers a money back guarantee? Ones like us who are so confident after seeing a steady stream of clients delighted with our estate planning process! Our

clients get a money back guarantee and are told at the end of the planning process, if they feel they didn't get the value for the price they paid, they can adjust the fee however they think is fair.

So how does Edwards Group charge fees in a way that will help you plan better?

Flat Fees. Our planning is done on a flat fee, so you don't have to worry about how much time we're taking (billing) working on your plan.

Choose Your Own Fee. New clients are presented with different planning options and the fees associated with each option. The options are based on the goals and concerns of the client.

No Surprises. We get to know about your situation, including your family and finances, before we quote a fee. You will know the cost of planning before you commit, so planning can be effective, not riddled with worry about how much it will cost.

When Edwards Group was started in 2008, David Edwards envisioned a firm that only focused on estate planning, where everything was designed around helping clients plan better and have peace of mind. That includes how our fees work.



Will you plan...



Don't think of a will as planning your death, think of it as planning for your loved ones' lives...

THE BEST FIRST STEP IN PLANNING?
ATTEND ONE OF OUR FREE WORKSHOPS

Intro to Edwards Group:
Wills and Trusts Orientation

Life Care Planning:
13 Costly Misconceptions
About Healthcare and Aging

*For upcoming dates, see our website
www.EdwardsGroupLLC.com*

Attend the "Intro to Edwards
Group Workshop" and Get **\$200**
Off Your Initial Meeting Fee!

To reserve your spot at one of our educational
workshops, call 217-726-9200 or email
Tarina@EdwardsGroupLLC.com.

5 Keys to Choosing an Effective Estate Planning Attorney

Springfield, Illinois 62711
4340 Acer Grove, Suite B
(217) 726-9200

Your Life • Your Family • Your Legacy

C O U N S E L O R S A T L A W

EDWARDS
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