DATE

**VIA U.S. MAIL**

Client

ADDRESS

ADDRESS

**Re: What to Expect in your Strategy Session**

Dear CLIENT,

I know that coming to see a law firm about planning your estate the right way can be a little intimidating for some people. No one likes to think about our own mortality, and sometimes estate planning can evoke some uncomfortable feelings. I want to reassure you that our approach to *“Legacy Planning”* will empower you with knowledge, making sure that you will leave our office feeling confident in your decision.

As a reminder, you are scheduled to meet with a member of our legal team on Wednesday, February 24, 2021 at 3:00 PM at our office, located at 39755 Date Street, Suite 203, Murrieta, California 92563 / by telephone conference / by Zoom Call.

In the meantime, I thought I would take a few minutes to let you know what to expect at your initial meeting.

The first things we will discuss with you are your family situation and your specific concerns, so that we can gain a clear and complete understanding of your unique circumstances and tailor your Estate Plan specifically for you instead of trying to offer you some kind of “one-size, fits-all” type of solution. After we understand your concerns and have answered your questions, your attorney will discuss your options and weigh the pros & cons of each one with you.

One question that comes up a lot is “what is this going to cost?” Our fees typically range from $3,450 to $6,500, contingent on what you want to accomplish and which Estate Planning package you would like. We can often structure a fee agreement to accommodate your family’s budget.

To give further reassurance that you are making all the right decisions, I have attached a copy of an article from Forbes called “Six Reasons Why You Need an Estate Plan” which discusses the crucial benefits of getting an Estate Plan in place for your family.

At this point, other than continuing to keep a list of your questions, thoughts, and concerns to bring with you to the appointment, there is nothing more you need to be doing to make the meeting a success.

We look forward to meeting you soon!

Yours Truly,

Mikael Feeney

Client Intake Director

Shoup Legal, A Professional Law Corporation.