[date]

[name]

[address]

[address]

[email address]

 **Re: Preparing for your [name of Strategy Session]**

Dear [Client Names]

Thank you for giving us the opportunity to help you with your Estate Planning needs, we look forward to meeting with you soon. As a reminder, you have selected the [name of Strategy Session], which means we will be providing you the following:

1. Complete review and analysis of your Estate Planning Documents (as outlined in your Engagement Agreement)
2. Complete review and analysis of your Bank Account Statements, Financial Statements, Beneficiary Designations, Retirement and Pension Statements, Real Property Title, and Investment Summaries
3. Review Current Funding of your Estate Plan (including your businesses)
4. Preparation of a written summary of your Attorney’s observations, recommendations, evaluation, and specific proposed strategies to address any concerns
5. A Forty-Five Minute Strategy Session with your Attorney to review the above.

This is a very involved process, and we are excited to assist you with this. Please make sure you drop off the following to our office located at 39755 Date Street, Suite 203, Murrieta no later than [date] for your strategy session with your attorney on [date]:

1. Your Estate Planning Binder (including all of the Estate Planning Documents outlined in your Engagement Agreement)
2. Bank Account Statements, Financial Statements, Beneficiary Designations, Retirement and Pension Statements, and Investment Account Summaries
3. Business Formation Documents (Minutes Book/folder)
4. All Real Property Deeds (we will pull title for you if you cannot find these)

We congratulate you on taking this first step to make sure that your family avoids unwanted legal issues if the unexpected were to occur, that your Estate Plan is prepared in accordance with California’s legal requirements (or changes in the law), your Living Trust is fully funded, your financial assets are properly planned for, and your Estate Plan is fully up-to-date with your personal situation.

If you have questions or are unsure about anything listed above, please feel free to contact us.

Sincerely,

~The Shoup Legal Team~

 (951) 445-4114