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Memorandum

To: All Clients

From: Kimberly A. Paton (Kimberly@PatonLawFirm.net)

Cc: Valeryia Avdeev, Esq. (Val@PatonLawFirm.net)

Re: What To Expect When Estate Planning

This memo is to help you better understand what to expect as we proceed through the Estate Planning process:

Kimberly works with her team to provide the best service possible. Her team is comprised of Valeriya Avdeev, Esq., and Paloma Rodriguez, Assistant.

We gather information from the above documents and the initial conversation. Then we prepare a first draft of your documents and send those to you.

Note that if you are a couple, we prepare only one set of documents to facilitate your review and the preparation process. Why? We send one set of documents when we see that they will be very similar. We find that it is generally easier for clients to focus on one set versus two sets of documents.

(If you find a typo or want to make a similar administrative change, you can call ahead and the revisions will be made before your meeting to review and sign.)

When you have the drafted documents in front of you, Kimberly or Val will review the documents with you in detail and they can confirm all such details and any changes that you would like. This can be done in person, on the phone, or on a zoom call.

Our next step is that we make any final revisions and schedule an appointment for you to review everything in person, make any final changes, and have you sign the documents. We never want you to feel rushed or pressured to sign something that you don't understand or feel good about. So, if we need to discuss more, then we will.

We typically keep the original signed documents in our Fire Safes to protect the documents. We provide you with Certified True Copies for any emergency need; or to allow you to review these in the future.

This is our general office procedure; however, we can accommodate any special situations. You are certainly welcome to take your original documents with you.