
WHY IS AN ESTATE PLAN IMPORTANT?

Estate planning involves more than death, money, and taxes. If you become sick, who will make important decisions for you? How will they know what decisions to make? Are there people you don't want involved? After you're gone, who will care for the people relying on you?

A high-quality estate plan should address those questions and more. By taking steps now with an experienced estate planning attorney, you can protect your loved ones, preserve wealth, and minimize confusion, disputes, delay, taxes, fees, and costs upon your disability or death.



WHY CHOOSE ROSS LAW FIRM LTD.?

Experienced: We are a "father and sons" team with 50 years of collective legal experience.

Trusted: We combine a full understanding of personal situations and current laws to create customized estate plans for clients. Our collaborative approach and sophisticated technology help us build flexible and effective plans to withstand the test of time.

Ethical: Our clients' interests always come first. We listen attentively to understand your family and legacy goals and provide ethical, exceptional legal service.



HOW DO I CREATE MY ESTATE PLAN?

We build a personalized estate plan in four steps:

- 1. Gathering Information:** Before we meet, we send you a questionnaire to complete and ask you to locate important documents.
- 2. Meeting:** We meet with you to review key information and ask questions to identify personally important details. We send a written scope of work and fee quote. We use fixed fees in most cases and offer flexible payment options.
- 3. Creating the Plan:** After you engage us, we send a draft estate plan and a customized letter that explains features, asks questions, and gives recommendations. We answer all your questions and can modify the plan if needed.
- 4. Activating the Plan:** Your plan takes effect only after you sign the finalized documents before witnesses and a notary public. We prepare "funding instructions" and recommend next steps for you to take to ensure assets can be properly administered after disability or death, including language for you to update beneficiary designation forms.

WHAT SHOULD I EXPECT?



Confidentiality: Client information is kept confidential at all times. We take this responsibility seriously.

Education: Estate planning documents can be lengthy and seem complicated. We answer all questions and educate you about what's important.

Guidance: We follow a step-by-step process to ensure timely, accurate instructions based on your specific plan. We are your trusted source for legal questions that come up in the future.

Personal Warmth: Clients say we are friendly, patient, and professional. Check out our many 5-star reviews on Google, Yelp, Avvo, and elsewhere.



HOW CAN I START?

Call or email us to schedule a no-obligation meeting with one of our experienced, friendly attorneys. Appointments are available in Inverness, Downtown Chicago, or by telephone.

(847) 358-5757

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ross.law/no-obligation

ROSS LAW FIRM LTD.