ONLINE ESTATE PLANNING DOCUMENTS

Ward and Smith now offers a fixed-price 'Essentials Package' of the five key estate planning documents every adult should have.

You may have no estate planning in place or outdated plans. Or you may have "straightforward" circumstances but need help creating and understanding the estate planning legal documents. And you want to avoid do-it-yourself products that often lead to mistakes, wrong results, litigation, and burdened family members. You want help right away from a source you can trust.

Introducing the 'Essentials Package' from Ward and Smith's Experienced Trusts and Estates Attorneys

For those who need estate planning documents immediately, we have created the "Essentials Package" of key documents every adult should have. The documents in the package include:

1. **Last Will and Testament** is the legal document that directs your assets at your death. The document under our package will provide for outright distribution to adult beneficiaries and "custodial" provisions for beneficiaries under the age of 21. Distribution must be made in equal shares or on a percentage basis. *If your needs or distribution plan are more complex, this will is not appropriate for your circumstances, and you should consider engaging in more comprehensive estate planning with one of our attorneys.*

2. **Durable Power of Attorney** names an agent to make legal and financial decisions for you if you become incapacitated.

3. **Health Care Power of Attorney** names an agent to make health care decisions for you if you become incapacitated.

4. **Living Will** addresses end-of-life decisions.

5. **HIPAA Authorization** authorizes your medical provider to share your medical information with the people you choose.

All Documents prepared will comply with North Carolina Law, and you must be a North Carolina resident to take advantage of this package.

Process and Meeting

If you wish to create estate planning documents through our Essential Package, you may request information using the form on this page. We will email you back by the next business day to confirm that we are able to represent you.

At that time, you will be asked to review online and electronically sign an engagement agreement that explains our services and provide credit card payment for those services. You then will be directed to complete an online information questionnaire.

Based on the information that you provide through the questionnaire, we will prepare your draft estate planning documents. You will receive those draft documents within three business days of completing the questionnaire. We will schedule a mutually agreeable time for a 30-minute telephone or video conference with one of our experienced trusts and estates attorneys to explain the documents and answer your questions.

During this meeting, we will finalize your documents and then send them to you for execution. Your documents are not effective until signed by you in the presence of two disinterested witnesses and a notary public. You will be responsible for executing the documents that we prepare for you, but we can assist you with that if needed.

If it is determined during your conference that your legal needs are more complicated and you want to address those needs in a more comprehensive way, you may choose to further engage our firm and apply the fee already paid towards that new representation.

Fees

The cost for the "Essentials Package" of trusts and estates documents is $950 for individuals or $1250 for married couples. If you would like our firm to assist you with executing the documents at our office location, we will do so for an additional fee of $150.

Additionally, we are able to offer a package of the four key collateral documents (the Power of Attorney, Healthcare Power of Attorney, Living Will, and HIPAA Authorization) without the Last Will and Testament. Some people prefer that avenue if their Will is in good order, but they need updated health-related documents. Please let us know which package you prefer.

What's Not Included?

The Essentials Package is not the same as the comprehensive estate planning our attorneys typically provide, which plans are crafted to meet our clients' specific goals and needs. Our comprehensive estate planning services include:

- creating trusts for beneficiaries to accomplish extended control, protection, and management,
- creating trusts for beneficiaries with special needs,
- mitigating or eliminating estate tax and income tax issues,
- addressing administration of complex assets, such as businesses and real estate,
- planning for the tax-efficient distribution of IRAs and other retirement plans,
- planning for complex distribution goals,
- avoiding probate and ensuring overall privacy at death,
- planning for preservation of assets if there is a need for long-term assisted living or nursing,
- home care,
- protecting against disinheritance of children in the event of a second marriage,
- and a host of other issues.

The "Essentials Package" is **not appropriate** as a long-term solution. If you have any of these needs, we suggest you make an appointment with one of our attorneys to discuss further.

If, however, you need the key estate planning documents and would like those prepared in a cost-effective and expedient manner by a qualified and trusted North Carolina attorney, the Essentials Package is made for you.