

CLIENT
WELCOME PACKET

K&P

KOHNEN & PATTON LLP



KOHNEN & PATTON

Welcome to Kohnen & Patton LLP. We understand that planning for the future can be complex and sometimes overwhelming. Our dedicated team is here to guide you through the process with expertise, care, and personalized attention.

We are committed to providing you with comprehensive and tailored solutions to ensure your peace of mind. Let us help you secure your legacy and protect what matters most. Please review this Welcome Packet, fill out the provided questionnaire, and if any questions arise, reach out to your attorney.

WELCOME



MEET YOUR TEAM



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ESTATE PLAN TIMELINE

01

Welcome Packet & Questionnaire

Review the materials set out in this welcome packet. Please fill out the questionnaire to the best of your abilities so we can understand your family background and goals with your estate plan.

02

Sign Engagement Letter

Review and sign the Engagement Letter sent to you by your attorney. Each letter outlines the scope of the engagement and the firm's billing policies.

03

Meet to Discuss Estate Plan

We will set up a time to go over your goals for your estate plan. Please bring any items requested in the questionnaire to your meeting.

04

Draft Planning Documents

After the meeting, we will prepare the documents in accordance with our discussions. Usually, this process takes about two to three weeks.

05

Review Planning Documents

We will send you draft copies of your documents for your review. If you have questions or would like to change something, this is your time to communicate your concerns with us.

06

Execute Planning Documents

Once the documents are ready to go, we will set up a time to execute the documents. If you would like, we will hold on to the originals and mail you a binder with copies of your documents.

PLANNING DOCUMENTS

Below are descriptions of the documents included in most estate plans, which typically include a Revocable Trust. Additional documents may be added to your plan depending upon what assets you hold.

- 01 Will**

The Will is the document that controls the disposition of your probate estate and names the guardian of your minor children, should you have any. In the event a probate estate is opened, the named Executor will handle your affairs and distribute your probate assets to your Trust as you direct in your Will. It is our goal for no probate estate to be opened through the use of beneficiary designations and retitling of assets.
- 02 Bill of Sale**

The Bill of Sale is the document that transfers your tangible personal property (i.e. furniture, artwork, heirlooms, etc.) to your Trust.
- 03 Revocable Trust**

The Trust controls the disposition of your assets upon your death. Any assets transferred to the Trust during your lifetime will be fully accessible to you as the Settlor of the trust. Upon your death, all of your assets will be gathered by the Trustee and distributed according to the terms of the trust. You can choose whether assets are distributed outright or retained in trust for the benefit of your beneficiaries and distributed over time.
- 04 Durable Power of Attorney for Finances**

The Durable Power of Attorney allows you to appoint an agent to “step into your shoes” financially and authorizes your agent to handle your financial affairs. You can control the timing of the authority of your agent to apply either immediately or only upon your incapacity.
- 05 Durable Power of Attorney for Health Care/Living Will**

The Durable Power of Attorney for Health Care allows you to appoint an agent to make health care decisions in the event you are unable to do so for yourself. The Living Will directs your physician to allow you to die naturally and to only provide comfort care in the event you are in a terminal condition or permanent unconscious state.



NEXT STEPS



Please fill out the questionnaire and schedule a meeting with your attorney to talk about how to move forward with your estate plan.



(513) 381-0656
www.kplaw.com

THANK YOU!