

7 Questions

To Ask Before Choosing an Estate Planning Attorney

Kudos to you for beginning the search for an estate planning attorney. You're taking the right first steps in securing your future—for you, your family, and generations to come. We hope this guide makes your decision-making process easier.

Choosing the right attorney can be the difference between an estate plan that works and one that doesn't. A good estate plan should address five components: family, beneficiaries, probate, taxes, and long-term care. Unfortunately, many estate plans only address two or three of those components. What's worse, most don't address long-term care, which has the potential to be the riskiest and mostly costly omission of all.

Asking the right questions is key to finding the right attorney, who can create the right estate plan for you—one that includes all the components you need. That's why we've compiled the seven essential questions you should ask before making your choice. We've included them in this handy printable format, along with space for you to take notes on the answers you receive. We've even added our own answers to each question so you can easily compare.

Schedule a consultation with each attorney you're considering and print out a copy of this guide to take with you, so you have plenty of room for notes. And be sure to check out our tips on what to expect during your consultation (located at the end of this document).



Use these questions to vet the estate planning attorneys you're considering:

1. In your opinion, what is the greatest risk in retirement that I need to guard against?

AlerStallings: Hands down, the greatest risk is the cost of long-term care. No one wants to consider the possibility of long-term care, but according to data from the U.S. Department of Health and Human Services Administration on Community Living, 70% of retirees need a long-term care facility. Should you need a nursing home, the latest ACL figures show that a month of care in a private room averages almost \$8,000 per month. That expense can quickly decimate retirement savings and leave a surviving spouse in a tough spot. We ensure that our clients are safeguarded through strategies like asset protection planning and trusts, which can prevent you from losing what you worked so hard to build.

2. How do you charge for your estate plans and how long does each case take from start to finish?

AlerStallings: Two of the most common frustrations people have with attorneys are that there's no clarity on cost and no clarity on how long the process will take. If an attorney can't give you that information quickly, they don't know the answer, and that should concern you. At your first meeting with us, we'll give you a package that includes our flat fee sheet—a transparent, easy-to-understand explanation of what we charge. As for the time to complete a case from start to finish, our 10-year average is 62 days.

3. How do you support the plans you build?

AlerStallings: *The truth is that 99% of attorneys don't support the plans they sell. Their engagement ends when your plan is finished. At AlerStallings, we're committed to serving you with heart, which means our firm will support you by being available for phone calls—at no additional cost—and providing you with complimentary annual meetings for the rest of your life. We know health, finances and family can change. Having an attorney you can lean on can make the difference between your estate plan working or not.*

4. Will you support my plan if I go into a nursing home?

AlerStallings: *Absolutely. We have an entire department dedicated to nursing home emergencies. That means you or your family won't have to find another attorney in the midst of a crisis.*

In the event of a nursing home emergency, it's important for your attorney to have expertise in dealing with Medicaid applications. That's why it's a good idea to ask any firm you're considering how many Medicaid applications they have open in your county. If they don't know the number, chances are they don't support families in these crisis situations. AlerStallings has 20 to 30 open Medicaid cases at all times across the state of Ohio.

5. What happens if you retire or stop practicing law?

AlerStallings: *This is such an important question. What if an attorney isn't around when you need them most? At AlerStallings, we use a team approach to support you. Three team members are affiliated with every case, so that no matter what happens, you'll be covered. Should there be a change to your team, our annual reviews also allow you to meet with any new attorneys so you can feel comfortable that you know the people supporting you.*

6. What is the average asset/estate size of your planning clients?

AlerStallings: *We support middle and upper middle-class families, each with total assets (including homes and property) ranging from \$500,000 – \$2,000,000.*

7. How many estate plans has your firm supported?

AlerStallings: *In more than ten years of business we've supported over 5,000 families and helped protect over \$500 million of assets from being lost to nursing homes. This is all we do.*

What to Expect During Your Consultation

Scheduling a consultation call is the first step toward finding an attorney that's truly well-suited to you. Consultation calls should be free and scheduled at a time that's convenient for you.

While you'll likely have a lot of questions, a good attorney should also have a lot of questions for you. You see, the first sign of a great attorney is how much interest they take in getting to know you and how they listen. They'll want to understand your goals, whether you currently have an estate plan, and what's important to you. After all, you're looking for someone who will be with you for life. Someone who will be there when you need them most. Someone who will serve you with heart.

At AlerStallings, our consultation calls are always complimentary, confidential, and scheduled with one of our caring attorneys. No jargon or doublespeak, just a compassionate conversation focused on you. This gives us an opportunity to quickly determine whether we are a good fit and whether we can help you and your family. If so, our next step is to bring you in for an in-person meeting.

Request a complimentary 15-minute telephone consultation: 614-654-5860

You've worked a lifetime to build it.



Protect your future.