**AGENCY NAME**

**Planning for your Appointment with The Advancement Group**

In preparing for your planning appointment, please bring the following information with you to your meeting:

* **Spouse** – if you are married, please make sure you both attend the appointment
* **Confidential Data Sheet** – please complete as much as possible and bring it with you
* **Existing Wills/Trusts** – if you have any existing estate planning documents, such as a will or trust, please bring that with you
* **Copy of Deeds** – if you own real property, please bring a copy of the deeds
* **Corporate Books** – if you own a business, please bring in your corporate records

Please bring in anything else that you think is important for the meeting, such as: divorce decree, copies of investment or retirement account statements, life insurance policies, etc…

The process of estate planning, beginning with the planning appointment includes the following sequence –

**If no plan in place…**

1. TAG will create a visual image (flow chart) of the process of estate planning and financial planning, as it relates to your estate, during your meeting with TAG (this appointment is free as a result of AGENCY’S partnership with TCF).
2. TAG will focus on your financial and estate planning goals and integrate philanthropic strategies into your plans considering family, financial, and philanthropic objectives.
3. After the explanation and any subsequent discussion of the plan, TAG will work with you to schedule a time with an attorney, this is where the drafting of estate planning documents occurs (and cost is incurred).
4. If you have an attorney, TAG will work with them to describe the objectives discussed in the planning appointment, the datasheet, the flowchart, and notes taken from the meeting so they may prepare your plan.
5. If you do not have an attorney that you work with, TAG can recommend one for you and set your appointment with them.
6. You will receive a copy of your flow chart from TAG.
7. The attorney will receive a copy of the flow chart (from TAG) and any other supporting information gathered during the planning appointment to be able to create the plan.
8. Due to TAG providing a flow chart of your plan, the cost for document execution with the attorney can be reduced up to 60%.
9. You will meet with the attorney to sign your estate planning documents and will pay the attorney at the time of signing.
10. If a gift has been made to a charity, a copy of the page(s) in the estate plan pertaining to the gift amount is requested by TAG to value and calculate the gift for the AGENCY NAME gift report.
11. The gift and donor name is reported to AGENCY, if the donor provides permission to release their name and gift amount.

**If a plan (will or trust) is in place…**

1. TAG will review the current estate plan and provide a flow chart of how the plan works (first death, second death, child/children, retirement account(s), etc…). This appointment is free.
2. TAG will focus on your financial and estate planning goals and integrate philanthropic strategies into your plans considering family, financial, and philanthropic objectives.
3. After the explanation and any subsequent discussion of the plan, TAG will work with you to schedule a time with an attorney, this is where the drafting of estate planning documents occurs (and cost is incurred).
4. **PLEASE REFER TO STEP 4 THROUGH STEP 11 ABOVE FOR THE REST OF THE PROCESS**.

To schedule your appointment or to find out more about this process and service, please call 918-491-0079 and ask for Mindy, Debbie, or Chris.