Kosin Law

PEACE OF MIND PLANNING SESSION

Estate Planning for Alaskans by Alaskans

What to Expect at Your Peace of Mind Planning Session

I know estate planning isn't always the easiest topic to bring up, but taking this first step is one of the most meaningful things you can do for your family. My goal is to make this process as clear, comfortable, and empowering as possible. Here is what you can expect when we meet!

01

Get to know each other and understand your family's unique needs

02

Learn your options and get all your questions answered

03

Decide on next steps and whether we are a great fit to work together

WHAT TO EXPECT

- A judgment-free conversation about your family and goals
- A clear explanation of what happens under your current circumstances
- A visual walkthrough of your options - will vs. trust
- Time to ask every question on your mind
- An introduction to our Estate Planning Packages and flat-fee pricing
- A clear path forward - whatever you decide

BEFORE WE MEET

- Complete your Estate Planning Questionnaire (through the DecisionVault portal) - just do your best, it doesn't need to be perfect
- If you have a spouse or partner, plan to attend together
- Set aside 60 minutes for our session
- All meetings can happen via Zoom or in person except the Signing Ceremony, which must take place in person

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HOW OUR SESSION UNFOLDS

1 YOUR STORY

After a brief introduction, I want to hear from you. The more I understand about your goals, concerns, family, and assets, the better I can serve you. This is your time to talk and feel truly heard.

2 SCENARIO A

We will walk through exactly what would happen to your family and assets if you were to become incapacitated or pass away without an estate plan in place.

3 SCENARIO B

If Scenario A doesn't sit well with you, I will show you how things could look very different with a proper, customized estate plan designed around your family's wishes.

4 YOUR OPTIONS

I will walk you through your planning options - will vs. trust - using your family's information as an example. You will leave with a clear understanding of what is right for you.

5 Q&A

You will have plenty of time to ask questions. We will also discuss whether your estate may be subject to taxes and what options may be available to protect your assets.

6 NEXT STEPS

I will introduce our Estate Planning Packages and flat-fee pricing. If we are a great fit, we will outline next steps. Either way, you will leave with clarity and confidence about protecting your loved ones.

We Look Forward to Serving You!

Congratulations on taking this important first step. I look forward to seeing you at your Peace of Mind Planning Session - in person or via Zoom. My inbox is always open: jenny@kosinlawak.com

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